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During tax season, some clients will be easy to get into your office, while others ... well, hopefully you'll get their financial information in time to file an extension. However, when it comes to the other nine months of the year, starting a conversation with clients or prospective clients isn't always as obvious or as easy.

Although most accountants probably didn't get into the profession because they have the skill set of a car salesman, you can take note of what the most successful sales people have an innate knowledge of: To gain trust, sales people will ask open-ended questions to get people talking. After all, most people enjoy talking about themselves. Unfortunately, once the client relationship is established this technique

often drops off. Maureen Schwartz, the executive director of the global public

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become an issue, which can lead to questions about solutions.

- 3. In the past, we've talked about [x, y, z] challenges. If you could solve one of those, when would you like that to happen?**

Putting a timeline on an existing challenge allows you to help clients frame action steps to solve it.

- 4. What are some areas you plan to keep focusing on this year, and which ones have fallen off the priority list?**

This question helps you narrow your recommendations if a client's past goal is no longer urgent or relevant.

- 5. Life is always full of change and surprise. [Share a personal example.] May I ask about any personal changes you're experiencing that could affect the company or how you do business?**

This is a great question in the tax arena, but also for business planning if the client has a personal challenge that may be distracting or financially stressful.

- 6. It seems like [economic changes, fuel prices, other external factors] have made my clients rethink their strategy this year. What's going on for you?**

A big, external issue that affects many people helps clients open up about how it affects their businesses.

- 7. Wow, you've [paid off debt, sold real estate, improved sales]. Congratulations! What's your next big win this year?**

This question shows you're paying attention to their efforts. Celebrate with clients and ask about their next big goal.

- 8. What's the one thing you're doing that you would love to delegate?**

This question can lead the client to talk about things currently done in-house that your firm could handle. It can also open up opportunities for you to discuss advisory services.

- 9. Can I ask your opinion on this?**

Asking for advice is a humble approach to building a great client relationship.

Clients appreciate being the expert, and you'll gain more information about their

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