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to the National Society of Accountants. The Louisiana group is mostly made up of public accountants who are enrolled agents. They came from all over the state for the organization's annual conference.

After speaking to the LSIA's president, I knew I had to keep the program pretty basic. He admitted that many attendees would prefer not to attempt e-filing, something that's routine to most accountants. He also asked me to stay away from "that Twitter stuff."

Of course, I included an entire section on social media in my talk because I knew the group would want to know about LinkedIn, Facebook and Twitter strategies, even though they may have thought they didn't want to hear about it.

The talk went well – and I found the group engaging, hospitable and more than anything else, like sponges. They were hungry to hear my main points on retention strategies, something I explained any accounting firm – regardless of size, location or service delivery – wants to know more about, especially in this economy. After my talk, several members came up and told me they were going straight back to their offices to try some of these strategies.

Here are a few retention strategies I presented:

Contact clients more than once a year. Most accountants are only in touch with their clients before tax season. Instead, find ways to "touch" the client more often to demonstrate how much you really care about their personal and professional lives. Pick up the phone and call the client. Most everyone wants to only communicate by e-mail. Skip the impersonal e-mail and pick up the phone. Your client will be really glad to hear from you and will almost certainly welcome the call.

Discuss what's changed and what's new. Tell the client the clock isn't running, and you want to discuss what's changed for the client since you last talked, as well as

what changes might be in his or her future.

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Believe it or not, as “basic” as these points seem to some, they are very unique to others – especially accountants who have been content for far too long to do business on the golf course or wait for the phone to ring with repeat or new business. Let's face facts: in today's business environment, those who wait for the phone to ring aren't going to survive for the long haul.

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