retain clients. When I talk with accounting firms across the country, client retention definitely remains THE hottest topic out there. I know everyone would agree it's far easier to keep a client than try to get a new one.

One of the easiest, yet often overlooked ways to retain clients, is to cross-sell the firm's services. Many firms miss this – some by accident and some by ignorance. If a firm is small, then this is a no-brainer, but most accountants in medium and larger firms have tunnel vision when it comes to cross-selling clients.

It's sort of like walking into a department store. The really good salespeople will try to cross-sell products from other departments. It not only adds to their commission; the clerks demonstrate to the customer that the store really cares about their business.

It's the same scenario in accounting firms, but you must listen to your clients to figure out what they need, and you must ask them on a fairly regular basis about their business and what kinds of issues they are having. Chances are, you'll hear something that enables you to explain to them that your firm can help solve that problem or issue very easily. It is then incumbent on you to set up a meeting between your client and the persons in that part of the firm.

Forget territorial issues; of course you have to work out the commission or pay structure, but you are also adding huge helpings of value by demonstrating you're more than a one-dimensional firm.

How do you handle cross-selling in your firm?

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