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**Dave McClure** • May. 08, 2013

From the **Bleeding Edge** blog.

I'll be the first to admit I have had a checkered career. From 18 years running the national trade association for the Internet in Washington...to eight years with the space shuttle program for BFGoodrich...to my years as a business consultant working with a range of problems common to small businesses. Including some assignments working with the client service departments of companies from General Electric to an accounting software firm named CPAids.

In these assignments I learned, the hard way, that the client is not always right. In fact, sometimes the client is a pathological liar, a severely violent psychotic, or a passive-aggressive nitwit.

You may adjudge that cruel, but hear me out. According to the National Alliance on Mental Illness:

- One in four adults in America experiences a mental health disorder in any given year. One in seventeen lives with a serious mental illness, such as schizophrenia, major depression or bipolar disorder.
- About 1.1 percent of the population lives with schizophrenia.
- Major depressive disorder affections about 6.7 percent of the population.
- Another 18.7 percent suffer from panic disorder, obsessive-compulsive disorder, post-traumatic stress disorder or phobias.

You can add to that the seven percent of the population who believes they have been abducted by UFOs, and you begin to see the magnitude of the problem. But while I

understand that your firm simple could not ever have any clients like these...you

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the support numbers and tie them up for the rest of the day. Sometimes, for several days.

Why? Because the head of technical support was raised to believe that the client is always right. In fact, people in client service get promoted not for solving problems for clients, but for their ability to withstand abuse over the phone lines. They, in turn, only promote people within the technical and client support departments if they demonstrate they can also “take it.” The result in our firm was that turnover in those departments was nearly 50 percent per month. Some new hires never returned from lunch on their first day.

So how does an accounting or tax service begin to deal with the problems of clients who are honestly mentally ill, while protecting their professionals from abuse and stress?

Begin by constructing a new paradigm that allows the staff to operate under the following rules:

- Service is a two-way street. Clients are entitled to as much reasonable service as they require to identify concerns, find the services they need, and solve problems. On their part, firm professionals and support people are entitled to respect, cooperation, courtesy and understanding on the part of the client. If both sides of the street are not open, the street should be closed.
- The client is not always right. In fact, the client is generally right no more than half of the time. As a courtesy to respected and valued clients, the firm may elect to waive certain fees or otherwise act with generosity. But this is a courtesy extended to good clients, not an acknowledgment of the client's position or an inherent right. Where these services are not extended as a courtesy, or if the requirements of the client fall outside of the boundaries of good client relations, the client should be expected to pay for the additional services received.

- Firm representatives in client service are hired for their talents, their knowledge

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This is a tough but fair philosophy. However, it requires a shift in thinking, and presents some concerns from the outset.

Clients will need to be trained. Some have been accustomed to verbally abusing people all of their lives without ever realizing it. A new working relationship will take time and patience while clients come to understand that — at least with your firm — this behavior is not acceptable.

Good clients will make the transition quickly. They will understand the value of their trusted business partners, and the value of having a respectful, professional relationship with the accounting or tax firm.

Real problem clients won't make the transition. These clients will need to — and will probably insist upon — talking to senior management. When talking to senior management, they will seem reasonable and sane. They will point out how much business they do with the firm, their long-standing relationship, etc. Once management caves in, they will return to terrorizing the staff, particularly support people. These clients believe, at some level, that by purchasing the services of the firm they are also buying the right to abuse the staff.

It is not important to understand why these clients are abusive, or that some have never in their lives had boundaries set on their behavior. Leave that to the realm of qualified mental health professionals. It is important to understand that these clients are costing more than they are worth in staff turnover, staff stress, personal sick days and other barometers of staff mental health, and that the firm is better off without them — regardless of how much they are willing to pay.

The largest concern about the new philosophy, though, will be the part that empowers individual professionals to terminate the relationship at their discretion.

This is a power generally reserved for senior management, and presents two

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however, the problem is more serious and the client will need to be invited to take their business elsewhere.

All of these concerns can be handled through use of established, written set of rules that define what a problem client is, how they should be handled and what the correct procedures are for terminating an unproductive client.

The client isn't always right. The question then becomes...how will your firm handle the ones who are mentally ill and abusive? The call is yours, but remember that it costs far less to find and groom a few new clients than the firm's best staff members.

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