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## ACCOUNTING & AUDIT

# Are You Suffering from a Professional Disconnect?

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**Darren Root, CPA, CITP, CGMA** • Sep. 09, 2013

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If you're like me, your mobile device is an indispensable tool that you use on a daily basis to manage your personal life. The list of digital tools that I use is a long one. I use my smart phone or tablet to access websites when booking my air travel, to check-in for flights, and to display my boarding pass. I use my bank's online portal to do all of my business and personal banking including making deposits, transferring funds and viewing transactions.

I also use QuickBooks Online (QBO) to handle my personal financial accounting so that all my bank and credit card transactions flow automatically into QBO. And of course, I use my mobile device to access my email, calendar, firm contacts, social media and other financial applications.

Current consumer research shows that I'm not alone in my digital device usage patterns. According to the Pew Internet and American Life Project, last year 55% of adults used the internet on their mobile phones—double the number who reported doing so three years ago. In addition, 31% of mobile internet users said that they go online using their mobile phone most of the time instead of using a desktop or laptop

computer. Given these statistics, I think it's safe to say that we've reached the point where it is *expected* that information and our personal and business functions will be available at our fingertips.

If I need to make a bank transfer, and I'm not sitting at my desk, I want a vendor that will provide me with the tools to do it at my convenience. For most of us, this is our life today in the digital age. However, for many of us who own or manage professional accounting firms, there is a major disconnect between our own mobile habits and expectations and our perception of our clients' expectations for the same things. In a nutshell, while *we* can't imagine not using digital tools and services on a daily basis, we don't make the connection that our clients expect the same type of services *from* us.

So, with this disconnect in mind, what is your firm doing to accommodate your clients' needs? I know, you're providing wonderful customer service and your product quality is outstanding. Again, I ask you, what are you doing to meet your clients where they are, in the way they want to consume information? If the answer is "nothing" or, "I'm not sure" then you have a professional disconnect. In essence, you are providing the same services using the same delivery model that you have for years, yet your clients are expecting to receive your services differently.

Not sure about the services that your clients may wish to have anytime/anywhere access to? Here are a few ideas. If you process payroll, client employees might like the convenience of accessing their payroll check stubs from their mobile devices. Clients may find it helpful to have access to their tax returns, financial statements, and other reports on multiple devices. For clients using QuickBooks, you can provide access to company files from a tablet device—very helpful when your clients are out of the office. The common theme here is that we all need to evaluate our old business models in order to meet the reality of today's connected clients.

Solving the professional disconnect between what your firm does and what your clients want doesn't have to be overwhelming. Start by understanding how your clients are consuming information and interacting with vendors that do offer their services in digital and mobile formats. Then map out your existing delivery models and compare them to those service providers. From there you can start to look at solutions to repair your firm's professional disconnect and truly deliver the quality service that your clients desire.

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