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Isaac M. O'Bannon • Oct. 14, 2014

Customers everywhere demand more personal attention in their shopping and service experiences, and accounting services are no exception. With so many ways to rate and rank the customer experience at their fingertips, today's consumers are empowered to expect far more from their service providers. BKR International members reveal five ways to make the client experience more personal — and therefore, more loyal on both sides of the relationship.

1. Ask more questions.

Sales and cross selling today are all about asking the right questions to pinpoint someone's need or pain, explained Howard Rosen, CPA, Worldwide Chairman of BKR International and President of Conner Ash P.C. in St. Louis, Missouri. "Instead of assuming what they need and talking all about your services, spend most of your

goal. Never underestimate the power of a phone call returned on a Sunday or a handwritten thank you note. These become the big things that keep clients coming back to your firm.

3. Automate, then test it.

There are lots of ways to use technology today to make your life or your clients' lives easier. Just make sure the automation actually results in less hassle, not more. From your client portal to your website, test the technology yourself to make sure that it is intuitive to the user and works as intended. Broken links or a slow page refresh or inability to upload or download can really affect your clients' sense of personal convenience.

4. Meet outside the office.

Some clients prefer to focus on business, but you don't always have to meet at the office. Invite them to talk over coffee or lunch or happy hour, said Jason Tonjes, CPA, BKR International Americas Region Chairman and Managing Shareholder of Bland & Associates, P.C. in Omaha, Nebraska. "Share some food while you discuss their plans. It helps you get to know your clients better and often relaxes them to reveal concerns or ideas you can support," Tonjes added.

5. Get in touch more often.

Don't wait for the phone to ring. No news is not always good news when it comes to client loyalty. Put a note on your calendar to touch base with clients at least quarterly, even if you only work with them once a year, said David Goldner, CPA, BKR International Americas Region Vice Chairman and Managing Partner at Gross Mendelsohn & Associates in Maryland. "You will show you are thinking about them and looking out for their financial wellbeing. More often than not, they'll have a question," Goldner added. They will also feel important — the number one reason

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