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**Jim Boomer** • May. 13, 2016



If your firm is like most, you are constantly looking for ways to fuel growth. The fastest and easiest way to grow is by leveraging your existing client base. And to do so you need to make sure that your base is full of happy clients. After all, happy clients tend to buy more services and refer your firm to friends and family. Sure, quality, timeliness and great overall service go a long way towards high client satisfaction. But so too does the ease with which clients can interact and do business with the

firm. Are you effectively leveraging technology to provide your clients with an easy

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best for operating the firm. An external facing lens is needed to provide your clients with the easy button they are now accustomed to having.

## What Easy Buttons Look Like

Easy buttons can come in all shapes and sizes and range from simple to complex. Ultimately, the goal is to limit confusion, complexity and miscommunication and give them one thing to do: hit the easy button. Here are a few examples:

- Embed a chat feature in your website for clients and prospects to easily reach a knowledgeable and friendly member of your firm.
- Send your clients a digital packet of all the information they need for a meeting or to complete the next step in the workflow. Also be able to point them to a location where they can reference that information at any time.
- Provide them with a technology tool that walks them through the process of providing tax information and documents click by click (think TurboTax).

## Integration/Automation

Cloud technologies offer greater integration and automation opportunities than we've had in the past. The architecture of the solution, mobile capabilities and level of openness the company has adopted are becoming as, if not more, important than simply feature and function. Expectations among clients, employees and partners are changing regarding how data flows between systems. As mobile devices continue to proliferate, the number of tasks we can perform by simply taking a picture is becoming much larger. Processes are moving toward "click it and forget it" as the systems automatically handle more and more of the manual tasks with algorithms. Are you offering these capabilities to your clients?

## Streamline Your Workflow

Equally as important as the technology tools are the processes your firm employs to

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## Attitude is Key

While technology and process combine to provide powerful tools for your team and clients, the overall attitude within your firm is also critical. You must maintain a focus on continuous improvement and make it pervasive at all levels of the firm, starting at the top. Leaders should evangelize the desire to make the clients lives easier and recognize/reward those that bring ideas to the table that achieve this goal.

In the end, if you adopt the strategy of always looking for new easy buttons for your clients, you will have a client base that exudes happiness. And, in turn, they will reward you by buying more services and referring you to family and friends. Thus, achieving the growth that we all seek in today's competitive environment.

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