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## CONTRIBUTORS

# How Accounting Firms Can Advance to a High Caliber Client Experience

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Kristy Short, Ed.D • Feb. 07, 2017



High-caliber status is achieved when you transport the client experience *beyond* expectations.

The client experience is at the center of every astoundingly successful business. Statistics don't lie: a recent survey by Gartner revealed that 89% of companies now expect to compete mostly on the basis of customer experience (versus just 36% four years ago). In the exceptionally crowded arena of competitors and overlapping brand promises, client experience has emerged as the single most important competitive differentiator. And rest assured that business leaders who dedicate the time and energy required to achieve client experience of a high-caliber status are those who will dominate their market space, win over prospects, and secure long-term client loyalty. Hail to these victors!

With client experience at the heart of a successful business model, simply understanding its place and importance isn't enough. You have to put in the time to cultivate the ideal client experience and ensure its prominence over time. Reaching the level of high caliber requires a balance of education (guidance on how to do it), time and effort (this is a life-long commitment), and intense motivation (lighting a fire) to enact cultural change.

### **What does “client experience” really mean?**

It's not just about how well your product performs, whether or not prospects like your ad campaigns, or if your support staff is polite and responsive. These are all laudable business qualities, of course, but not exhaustive in relation to client experience. Rather, it's the way you engage with clients and the cumulation of every interaction they have with your firm. This means firms have to start thinking beyond “standard” good customer service—that is, basic elements such as outstanding products, responsive staff, or magnetic communications. These are merely the fundamentals of client experience. High caliber is only reached by going above and beyond for your clients.

Don't be fooled by a false sense of “excellence” either. While you may think you've cultivated a be-all-end-all client experience, consider the fact that 80% of companies (big and small) believe they deliver “superior” customer service. Yet (and here's the rub)...only 8% of customers think that these same companies deliver a “superior” client experience (Gartner 2016). Ouch.

These are powerful, informative stats that should motivate any business to evaluate its existing client experience, and the evaluation process must be comprehensive and

analysis of results honest.

For most firms, the question is: “Where do I begin?” To get started, firms first need to ask the right questions:

### *What’s my story?*

It all starts with your story!

You are so much more than the products and services you provide. There’s a story there, one that’s engaging and heartfelt—a story that can draw prospects in, make a personal connection, make prospects and clients care about the relationship over the actual services provided, and differentiate your firm from a vast pool of competitors.

Consider how a well-crafted, genuine story can differentiate seemingly equal competitors in the following example...

Northern California’s Napa Valley is known for world-renown, award-winning wines and 400-plus wineries. A slow cruise through Napa brings with it endless rows of grape-heavy vines and hundreds of wineries defined by lush landscapes and elegant facades. From afar, there are no true differentiators among distributors. So then why do some draw more new and returning visitors than others? The answer lies in their stories.

At Artesa Vineyards and Winery, for example, patrons receive more than a simple visit—but rather are invited in to experience “life beyond the label.” Visitors are greeted by orators (not sales people) who weave a vivid, engaging story about the land, the history, the winemakers and the craft. Guests become an active participant in the process—a part of the story itself—creating a personal connection and a powerful bond. Oh, and by the way, guests can also buy a few bottles of wine while they are there. Without the story, the experience begins and ends with an extraordinary product—the same message everyone is putting out.

Because your firm represents so much more than than the services provide, you must take the time to explore your story, define it, and ensure that everyone on your team is telling the same genuine tale. This is how you make that personal connection that keeps clients loyal and draws new clients in.

### *Does your business model support your story?*

You can tell all the stories you want, but if your business model doesn't support your claims, the client experience will suffer.

You set yourself apart from the competition by telling your story of greatness—which may include unparalleled client service, advanced technology, deep accounting expertise, and/or a commitment to your community—to name a few. Whatever story you tell, you must deliver on it. If your business model doesn't support your claims, your story will work against you.

A high-caliber experience requires that all the pieces are in place, including:

- **Technology**—Your firm should be the most advanced in the area of technology—supporting a cloud-based platform that delivers 24/7 access for staff and clients. You can't begin to go beyond client expectations if you are not set up to operate at peak efficiency.
- **Staff**—Do you have the best-of-the-best working for you? Your staff is on the front line of the client experience, so ensure you've built an all-star team. Also make sure that you have employees in the right position—one that allows them to leverage their unique talents.
- **Training and communications**—You have to be dedicated to life-long learning for your staff. It takes a lot of effort to keep your team at all-star level. You also have to commit to frequent and clear communication to staff, so everyone is always updated and prepared to provide high-caliber service.

### **Have you built a culture to support your story?**

Your firm culture is the beating heart of the client experience—a direct representation of your business that will either propel you to greatness or sink you like the Titanic. Think about it... when your team is in perfect harmony, not only does your firm run like a well-oiled machine, but your clients benefit from stellar, above-and-beyond service. A happy team means well-cared-for clients. A superior client experience can never happen within a culture of discord and confusion.

A positive culture doesn't happen overnight. It requires a dedicated leader (one that leads by example) and can take years to develop. Few have built a culture that equals that of The Ritz Carlton—the reigning champions of the high-caliber client experience. The Ritz Carlton has quite literally written the book on “service beyond expectation.” The following client testimonial speaks volumes:

Seconds into my first paddle boarding excursion in St. Thomas, I lost my balance and my new sunglasses. Later that afternoon a Ritz Carlton staff member approached me, inquiring if I had lost my sunglasses. I acknowledged the mishap and was handed over a pair of Ray-Ban's. They were my "lost-at-sea" sunglasses. I was stunned.

After a staff member overheard that we returned from our outing one pair of shades short, hotel staff did a little snorkeling recon and recovered them. We never mentioned the sunglasses to anyone, and we certainly didn't expect anyone to look for them. It was *beyond unexpected*, and as it turns out, that is exactly the point.

Part of the Ritz-Carlton mystique is the *Fulfillment of Unexpressed Wishes and Needs*, and they are very specific in how to accomplish that objective with the goal of developing such strong emotional engagement between the hotels' staff and their guests that "a guest will not consider staying anywhere else, if they have an option." They understand that relationships precede financial results and rely on a robust data set that demonstrates the impact engaged employees and repeat customers have on the bottom line. (R. Estis, 2014).

Now that's a culture everyone should want to get on board with!

### **Parting words...**

A high caliber client experience doesn't come easy. It takes time, dedication, and a keen eye to consistently identify areas for improvement and innovative ways to move beyond clients' expectations to "fulfill unexpressed wishes and needs." The client experience is an ever-evolving organism—so firms must adapt with the times and the changing needs and expectations of clients. Reaching the level of high-caliber client experience is one thing, staying there is a life-long commitment.

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