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their door, instant access to people at all levels using social media, constant updates on news through alerts on their smartphones and even their watches ...

Gail Perry • Jul. 18, 2017



I had the honor of spending a day recently with members of the Rootworks community, a group of accounting firms from all over the country who met to discuss ways in which they can be better. Defining “better” is a singular task, as each firm, person, client, assigns that term a different meaning. But my primary takeaway, as the group discussed what they can do to be more 21st century, more modern, even using the hashtag #themodernfirm, is that accountants who are likely to succeed will do so by improving the accountant/client experience.

Just think about what consumers want today: online ordering and delivery right to

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Try taking one day and documenting the client experience in your firm. Think about these issues as you imagine yourself being one of your clients:

- How do clients contact you?
- If they phone, does a person answer or is there an automated service?
- What are each of those experiences like?
- How long do clients typically wait on hold?
- What is the hold experience like?
- How often do your clients get routed to voice mail?
- How rapidly do you reply to voice mail messages?
- For clients coming in the office, how comfortable is your waiting area?
- How are clients greeted?
- Are clients offered a beverage?
- Is there WiFi for the clients to use and are they made aware of this?
- How long do clients typically wait in the reception area?
- Within your office, is there comfortable seating? A work table? Is the lighting bright and welcoming?
- Do you look at the clock or your watch when talking with clients?
- Do clients know if you are timing their visit and how or if they are being charged for that time?
- Do you provide a portal where your clients can securely share documents?
- If there is a portal, have you instructed your clients on how and why to use this?
- Are clients encouraged to contact you whenever they have questions?
- If so, have you explained the best way for them to contact you?

If you were the client, would you respond negatively to any of these experiences? As the accounting practitioner, do any of these items frustrate you? By picking apart

your client experience into small steps, you can isolate problems and find ways to

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