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Darren Root • Aug. 21, 2017



The profession continues to change, as do client expectations. It's no longer just about delivering a quality product or service. It's about delivering an overall experience to clients—one that makes them feel good, confident, and willing to come back time and time again. Heightened competition and the modernization of client needs have challenged accounting professionals to find new and innovative ways to stand out from the crowd.

According to Gartner Research, 89% of businesses today expect to compete mostly on

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And I really mean every interaction—starting with initial contact (the point the client became aware of your firm) through to the relationship's end. Today's clients expect to develop a relationship with the organizations they conduct business with—and that takes dedication and focus. For that relationship to grow and prosper, it comes down to how all of those interactions over time make the client feel. If the experience is superior, you have client for life. If it's bad, you'll most certainly lose out to the business who has mastered the art of client experience.

What are clients looking for?

Personalization, convenience, and a relationship. Gene Alvarez, Managing VP at Gartner stated, "Customers will not tolerate companies that have amnesia when it comes to remembering them and their preferences for recognition. This makes it imperative for companies to recognize their customers and to serve them pertinent content that demonstrates the proper recognition and treatment."

Here's what we know: Customer experience is king, and people are changing their buying habits based on it. So, how are you going to react? As you think through client experience in your firm, here are a few things to keep in mind:

Make every interaction with clients personal

Use client data to bolster their experience. Send a birthday or anniversary card; have their beverage of choice ready before they arrive for the next onsite meeting; learn their communication preferences and preferred name when you contact them. Going beyond expectations is key.

Make clients aware of firm features that will make their lives easier, such as:

- On-demand appointment scheduling.

- The ability to contact the right person via the right method...be it instant

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conference. For others, this may be as simple as being on time and prepared for onsite meetings. In delivering items, this could mean anything from offering the convenience of digital signature and delivery to curbside service.

Arm your firm with the right technology

If firms are to maintain consistent, positive contact with clients and build strong relationships over time, they require technology designed to support client experience. Today, firms have the back-office (or “back stage”) work covered when you consider the multitude of tax and accounting solutions that streamline transactional tasks. However, what has been missing from the technology equation is a true client experience platform—one that simplifies management of “front-stage” client tasks, including on-boarding, signature capture, client messaging, information requests and more. LISCIO represents this missing piece—the first client experience platform for the accounting profession that bridges the gap between client experience tasks and back-office transactional work to support connected, positive client relationships.

To sum it all up: Get to know your clients and be aware of how interactions with your firm make them feel. If your client experience is lacking, start work now to improve it by evaluating all communication points and ensuring you have the right technology in place to build strong client relationships. Use this shift in buyer behavior to make your firm, not break it.

A highly-regarded influencer in the accounting profession, Darren leads LISCIO as CEO. He has earned a spot on the “Top 25 Most Influential Thought Leaders” and “Top 100 Most Influential People” trade journal lists multiple times. Darren is the author of multiple top-selling business books. His most recent, *The Intentional*

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