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Jim Boomer • May. 13, 2019



Client acquisition and retention are two must-have goals for fueling growth in an accounting firm.

A lot of emphasis is placed on driving new business, but after you've won the client, the real work begins. You can't overlook the value of maintaining and leveraging your existing clients. To do that, you need to make sure your base is full of happy clients who want to engage you for more services and refer your firm to friends and family.

Of course, quality work, timeliness and excellent overall service go a long way

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your clients an enormous amount of convenience when conducting their day to day business. Banking, communications, scheduling meetings and appointments, product research, shopping and more can be done any time, anywhere with a mobile device. Why should your firm be the outlier?

Too often, leaders focus on technologies that make their firms more operationally effective while client experience takes a back seat. If the firm doesn't experience immediate time savings, they scrap the initiative. This focus on operational efficiency is short-sighted and overlooks the fact that providing value *from the client's perspective* is paramount.

We can no longer base all technology decisions on what works best for operating the firm. Putting the client first needs to be at the center of your technology strategy.

What the digital client experience looks like

A digital client experience can come in all shapes and sizes. Ultimately, the goal is to limit complexity and miscommunication. Here are a few examples:

- Embed chatbots in your website to allow clients and prospects to have simple questions answered quickly or easily reach a knowledgeable and friendly member of your firm for more complex inquiries.
- Embed social media into your marketing strategy to position your firm as an authority on matters that are important to your clients. Post content frequently and interact regularly with followers. Remember, social media is about creating a dialog, not just pushing out information.
- Take advantage of technology that replaces paper organizers and allows clients to answer questions, sign engagement letters, access PBC lists, and securely send documents using their mobile device.
- Utilize software that automates tax return assembly and delivery, e-signing Form 8879, quarterly estimated payment vouchers and electronically delivery of K-1s

- Update your firm's website to ensure the layout and content are attractive and the

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principles to streamline workflow not just for compliance services like tax and assurance, but for advisory services and internal operations such as client onboarding and time and billing.

Again, it's not solely about making the accountants' job easier but about making it effortless for clients to do business with the firm. Simplify the data collection process and provide an easy-to-use system for delivering the final work product to minimize any barriers clients face when interacting with your firm.

Mindset is key

Have the mindset that improving the client experience is a top priority, while making the firm more operationally effective is secondary.

A combination of technology and process can provide powerful tools for your team and clients, but the overall mindset within your firm is also critical. Leaders must prioritize making clients' lives easier and focus on continuous improvement. By recognizing and rewarding team members who bring ideas to the table in support of this goal, this mindset will permeate all levels of the firm.

By adopting the strategy of always looking for innovative ways to digitize the client experience, you'll make it easier for clients to work with you and improve client satisfaction. In turn, they will reward you by engaging your firm for more services and refer you to family and friends. In the end, you'll realize the growth that everyone seeks in today's competitive environment.

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