

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

accountants would have seen themselves replaced by computers by now.

May. 13, 2019



Numbers are numbers are numbers, right? If it were all about the numbers, accountants would have seen themselves replaced by computers by now. And, in fact, many accountants are worrying about just that scenario, as computer software becomes more savvy, more predictive, more analytic. But, at the end of the day (or month, or quarter, or year), there are still the people relationships that matter. So what happens when the client expectations don't match up with the service that you're offering?

I like to tell a story about an experience I had in my early days as an accountant. I was working as a tax accountant, taking care of the taxes for a particular business

that was run by a man who had strong opinions about the place of women in the

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Rather than give him a hard time about his attitudes and beliefs, and rather than turn his account over to someone less qualified in this area, the firm came up with what, at the time, seemed like a creative and workable solution. When the client would come to the office, we would have a male accountant meet with him. I provide the accountant with a list of questions I needed to have answered in order to take care of the client's tax matters. Furthermore, to make sure I got the information I needed, I was positioned behind a partition so that I could hear the conversation with the client but he couldn't see me. Crazy, right?

This probably wouldn't fly in today's professional environment, but at the time, it was just something we did to make our client happy. I didn't care that we did it that way – given his attitudes, I really didn't want a relationship with the man. My relationship was with the firm and that was who I was working for. Today that scene seems outrageous on several levels, but at the time, it was just a funny story about a weird client.

I wouldn't be surprised to hear that you've had a story or two about clients with surprising expectations. Maybe it's part of what makes this job fun, or maybe it's just exasperating. In any case, it's part of the path we've chosen.

Firm Management

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved