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Some things never change about providing great leadership. You must have the right vision with the right people and the right solutions for clients. This column is not about teaching you about human leadership, but about industry/niche thought and technology leadership. What are you doing to stay current in the profession? How are you maintaining your understanding of client needs? Who do you associate with to grow your expertise outside of public accounting? When do you take time to research possible solutions? How have you innovated lately? As pointed out in last month's column, information technology should be a people and service enabler, not a service inhibitor. How are you leveraging technology to help your team?

So, How Do We Lead?

An obvious answer is to not follow. In the accounting profession, we frequently play

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Why had he come? "I was just watching you in the past, what have you done for me lately?"

Gale Crosley has taught many firms to schedule discovery meetings that have the purpose of uncovering client needs. If you can schedule just one discovery meeting a week with clients, with a short agenda to guide the conversation, you will discover new needs in almost every meeting. If you can get your whole team doing discovery meetings, you'll have more needs brought back to the firm that you can possibly satisfy. You will have to filter these needs into product offerings that you can offer as a service.

Micah Solomon in a [Forbes article](#) points out that "Every customer, every human, is subject to what's called hedonic adaptation. Which is just psych speak for *the human tendency to get used to any situation, whether thrilling or painful, in a way that dulls your initial impression of it.*" Your firm may be providing great client service, your technology may be working flawlessly, but after a while, client expectations become greater. Even if you have improved your service offering, the improvements may not outpace the expectations.

One way to create new product offerings is to gather the client needs that you have accumulated from discovery meetings into a common theme of service. What is the opportunity for this service inside your client base and from potential new clients? Do you have the expertise, or can you grow it? Does this service further promote your expertise in an industry or niche? Can you narrow your focus on these industries while expanding your service offerings profitably? What technology tools are required to deliver the service effectively? The greater knowledge you have in an industry or niche, the more informed you will be and the greater thought leadership you will have. You will need to do research and read articles, and attend conferences and webinars focused in these areas to increase your expertise. You will discover that meeting client needs with new products and services will become easier over time as

your expertise grows. You can support these needs with technology automation.

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reporting have value to clients but automating the business tax return from well maintained financials has had benefit to the professional CPA firm, too. Additional services including bill payment (AP), expense tracking, payroll (PR), human resources (HR), sales tax compliance, costing and many other services are desired and appreciated by the clients. Cloud computing has enabled many of these offerings. Firms have built hosted offerings on Right Networks for QuickBooks desktop and added tools like [Bill.com](#), [Expensify](#), [Intuit Payroll](#) or [OnPay](#), [Bamboo HR](#), [Avalara](#), and many other applications for document management such as [Hubdoc](#) and [SmartVault](#). Likewise, firms have built solutions using [QuickBooks Online](#), [Xero](#), [Accounting Power](#), [Sage Intacct](#), [Thomson Accounting CS](#) and other third-party tools based on their knowledge and client needs. In other columns, we have discussed how to build the offerings, how to price the service including automated monthly billing, and how to automate the practice with standardized reporting and dashboards as well as automated bank and credit card feeds.

Are the Service Offerings It?

No, the service offerings are the start of building leadership. One or two offerings does not make you a thought leader, but you are ahead of many of your peers. When you look for solutions at deeper and deeper levels, become more involved in your clients' strategic needs as well providing tactical solutions, then you are becoming a trusted advisor. While many of you have built great relationships with clients through the years based on your tax and audit practices, new generation owners have new generation expectations. How are you responding to the new and old business owner needs? Can you assist these new clients in building out the loan applications so they can win approval with tools like [Commercial Loan Success](#).

Do you have a presence in the online community of your industry niche? Do you have visibility in your community in your specialty? Are you and your firm considered the experts in your industry niche? Why not? If you are using the same tools, doing

things the same way that you did two or three years ago, that may be part of your

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