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As we become a more technologically advanced society, the high value we place on human interaction has surprisingly remained intact. That's why now more than ever, many financial companies are integrating human-centered strategies into their business models. From Capital One introducing banking cafes to CPA firms providing [more face-to-face advisor experiences](#), the human touch has now taken center stage in the tech-forward finance and accounting industry. Although companies are making this a priority, CPAs should also take notice. Taking time over the summer slowdown to reflect on your goals and plan ahead are just a few great ways to stand out to your clients and prospects.

In order to do just that, you need to put yourself in a position to build on your existing client relationships — not tear them down. Use these three steps to plant the

seeds of good rapport this summer — and watch as your client relationships blossom

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time, or maybe you take so long chatting with them that you run into another appointment time. Tiny blunders like these can cost you opportunities to deepen client relationships, gain referrals or even find future business if it's done often enough. The point is, you must protect and build upon your reputation at all costs. If these examples sound like you, use tools like Google Calendar to set reminders that pop up and alert you of upcoming tasks and engagements or use time-management services like [Toggl](#) to oversee your time more effectively between clients. By utilizing these tips to prevent these work habits ([and more](#)) from damaging your personal brand in the eyes of clients and peers, you build a solid reputation — the cornerstone of success for any CPA.

Always make yourself available as a knowledgeable resource

Now that you've protected your reputation by kicking those bad habits to the curb, start reaching out to clients to find new opportunities. Work slows down during the summer months, but if you stay active while the rest of your competitors are taking it easy, you can give yourself a big edge.

Earn client trust by standing out and delivering. How? Follow up on previous office visits and any issues you may have helped to resolve. Attempt to identify ways to streamline company processes and make reporting less stressful for clients by sharing shortcuts or making software recommendations. Ask about any quarterly maintenance opportunities or future quarterly planning work that you could get a jump on, and make recommendations for new programs that could help keep them more organized. Give them peace of mind that if they decide to take time off for the summer, their finances will be in good hands. Even better, if you call and check-in with your clients to demonstrate your dedication, they'll be extra grateful. Habits like these are the good kind that can build client loyalty. Once summer is long gone, and clients are back in the swing of things, they'll remember your helpfulness during the

downtime and be sure to follow up with you. Unsure of what to ask to bring in new

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cycles as you run.

Maintain a simple workspace to improve accuracy

It may seem like a small thing, but schedule a few minutes at the end of each workday to make sure you're maintaining your workspace. Why? Because over time, the added clutter can contribute to making you feel busier, missing emails and potentially even not hitting your deadlines. Have you recently fallen behind on any housekeeping tasks around your workspace? Are you riddled with emails? If so, set some time aside during the summer to do a digital detox and declutter your workspace to finally get organized. Use [digital tools](#) and schedule time to implement work processes so that you can avoid little things from piling up. Follow tips from [this article](#) to take advantage of the slow summer months and get caught up on anything that needs your attention.

No matter how you divide your time between the beach and being behind a desk, utilize at least some of your time this summer to enhance your practice as a CPA. Technology has improved the way finance and accounting professionals work and with so many innovative new tools at our disposal, it's time for CPAs to deliver personalized client service that showcases the value of partnership beyond just implementing the latest and greatest tools. Doing so will only improve your practice and strengthen the bonds of your client relationships.

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About Jodi Chavez, Group President, [Randstad Professionals](#), [Randstad Life Sciences](#) and [Tatum](#)

Jodi oversees the field organization and provides strategic direction for Randstad Life Sciences, Randstad Professionals and Tatum. With more than 20 years' experience in the staffing industry, Jodi's entrepreneurial drive and strong business acumen have enabled her

to consistently increase revenues, grow profits and deliver ROI. Her breadth of expertise

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