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of coffee, but that doesn't mean that clients' expectations about getting exactly what they want out of your services are much different.

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These days, I can walk into any coffee shop and order my favorite drink, right down to some exact specifications. Gone are the days of the black drip in a paper cup: when people say they're "going for coffee" that could mean a triple venti no foam latte, or a decaf cappuccino, or a London Fog. From those corner coffee shops, to huge companies like Netflix and Amazon, we've entered a world where customizing customer experiences equal big profits.

Accounting and bookkeeping are clearly much more complex jobs than making a cup

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professional. The problem is, small business owners and entrepreneurs don't always have a clear picture of what their needs really are, or what you're capable of giving them.

So how do you figure out what is the best way to work with each of your clients?

A great place to start is noting the nature of their business. Is this person flying all over the country? Are they going out to job sites? Do they work from home? This gives you the context for *where* they'll viewing and digesting your deliverables. The ideal situation is that your client is sitting in a quiet room taking a good, hard look at their monthly reports. But that's not realistic for many of your clients. If the client is on the go, it's a good idea to see how you can give them options for accessing their information. Do you need to implement an app that allows clients to see your reports on their smartphone? Do you need to create more at-a-glance-style reports?

As you're probably very aware, not all clients are engaged with their numbers. Your clients know you're a vital part of managing their finances, but they might be not getting the full value of your expertise because they aren't numbers people, or they have a harder time looking at financial info and translating that into actions that improve their business. It's important to have a conversation where you figure out how your clients learn best (something I wrote a little bit about in [this article](#)). Some people love to see numbers on a spreadsheet, but many will prefer visualizations like a line graph that shows growth, or a pie chart that shows how major customers contribute to the bottom line.

If this sounds daunting, I sympathize. When you have one great system working, it can be destabilizing to create new systems for 10 or even 100 clients. Thankfully, AI and automation are lightening the load of manual processes, so it's a lot easier and faster to implement changes to those processes. That's a large part of why the 16<sup>th</sup> annual [Tax & Accounting Technology Innovation Awards](#) focused on apps like

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