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Jim Boomer • Aug. 08, 2019



We're living in an era where every part of our daily lives is impacted by technology in one way or another. We have numerous new methods of electronic communication and seemingly endless options for home entertainment and improved technology that makes our homes more organized and secure. We can shop online any time of the day or night from the comfort of our homes. We have increased accessibility to treatments for health concerns and expanded access to information and education.

While we might not be aware of it, we've come to expect greater automation of

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clients value the big stacks of paper they mail out each year. Take tax organizers: few firms actually expect their clients to fill out paper organizers, but they continue to mail them, thinking it's an effective way of reminding clients to start getting their tax documents together, all while keeping the firm top of mind.

In reality, your clients don't want (or even look at) tax organizers. Many are immediately tossed in the shredding pile, and the rest are returned, blank and unsigned. Printed financial statements, tax returns and other deliverables suffer the same fate.

Most clients place more value on timely information that is accessible anytime, anywhere, from any device.

Clients expect self-service

When was the last time you waited in line at a bank to deposit a check? Waited for a monthly bank statement to arrive in the mail to balance your checking account? Talked to someone in a call center to determine when a package would arrive? Booked airfare with the help of a travel agent? For most people, it's been years.

We've become accustomed to using technology to access services at any time, from any location at our convenience, and we enjoy the ability to control the interaction much more than is the case when we deal with a live person. Self-service is the expectation, and most people view it as a value-add rather than a detractor.

Just remember that self-service is not a replacement for relationship building. Rather it allows your team to focus on higher-order drivers of client service.

CPA firms are not unique

Time and time again, we hear leaders of CPA firms claim they cannot take advantage

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They can use the same types of tools to collaborate with you. In fact, they're probably wondering why you aren't offering them yet.

Where to start

With clients expecting increasingly digital experiences, it's incumbent upon all firms leaders to ensure the firm is up to the task. Here are some initial steps you can take to meet client expectations.

Truly go paper free

As mentioned earlier, many firms still do send stacks of paper to clients every year, even though clients neither want or use it. Look for ways to reduce that burden you place on clients, your team, and the environment by eliminating paper. Many solutions now allow clients to “snap a picture and forget it.”

With less paper, you'll be able to:

- Free up office space previously used to store paper files
- Save money on printing and copy paper, ink and toner, postage and file storage
- Save time-wasting steps of printing, filing and manually searching for paper documents
- Keep client information more secure than it is stored in paper files in your office
- Provide a better overall client experience

Prioritize collaboration, accessibility and a digital client experience

When evaluating new technology solutions, look for ones that allow you and your clients to exchange information and documents easily. Remember, this isn't just about making your own work life easier; it's about providing ease of use for your clients.

Several solution providers offer cloud-based collaboration with clients, the

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weaknesses. Reach out to people on your team, to your solution providers, in your peer network or an outside consultant who can help you along the path.

Change Your Mindset

Without a growth mindset, you won't be able to embrace change and fully leverage the capabilities of aligned technology and processes. Rethink how you interact with clients. Look for solutions that are cloud-based and mobile first. If they haven't started already, your clients will soon demand the same self-service options, real-time information and mobile capabilities that they get from banks, online retailers and other service providers.

Get ahead of their expectations to avoid having your clients move on to competitors who will. It's incumbent upon firm leaders to advocate for their clients and demonstrate how meeting client expectations ultimately drives the firm forward too.

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