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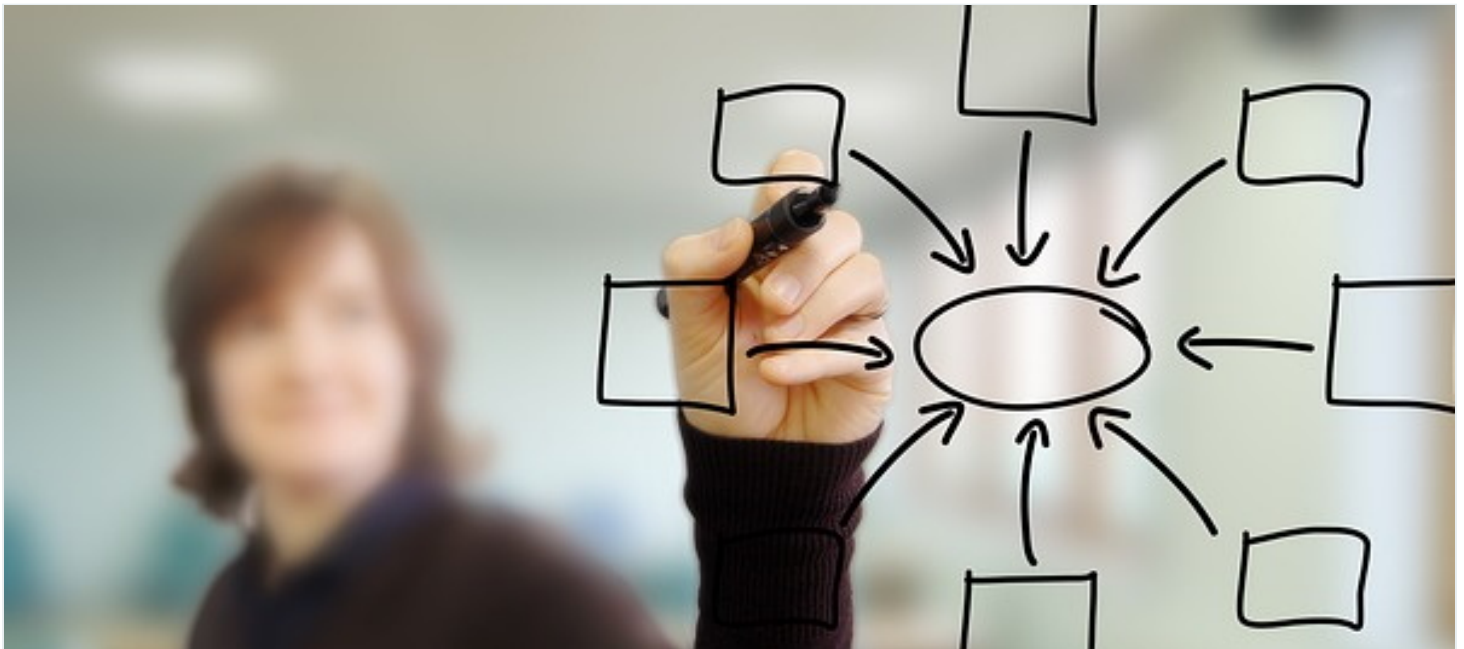
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ACCOUNTING & AUDIT

"Alexa, Call My Accountant": Staying Relevant in an AI World

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Garrett Wagner, CPA • Jan. 29, 2020



In 2020, no matter what generation you hail from, you are no doubt familiar with asking questions of a digital assistant. What is today's weather? When is that movie starting? Play my favorite song.

These voice assistants are powered by artificial intelligence (AI). They're in our cars, our homes, throughout the workplace. The lure of AI is it answers our questions in an instant. No emails, no texting, no search engines.

We're at the end of the beginning of the digital age, and we love the millennial mind. When it comes to trivial topics, they just use AI rather than wasting time, querying one another. AI knows the answers, just ask your phone. That's cool.

But, as accountants, do we flip a switch and suddenly become less cool with our clients? Despite what is happening all around us in banking, restaurants, ecommerce—are we old school, making believe that our profession's knowledge isn't flowing into databases where AI will soon feed it into Alexa?

Wouldn't it be a good idea if people could ask questions of us as comfortably as they do of Alexa?

Don't we want to remain relevant as advisors? Don't we aspire to be the first source in our client's lives when it comes to their questions?

We are best positioned right here, right now to be the real-world AI for our clients. And if we do not capitalize on it, how soon might it be before we get replaced by those who embrace AI—by Alexa, Cortana, Siri, or Watson?

What Can't Watson Do?

Understand this: IBM's Watson can query numbers, nouns, noses—all at the same time. Watson is AI on steroids. It learns as it goes along, teaching itself how to read and process data, documents, visuals, and so on.

Someone could ask Watson, "How do I record a vehicle trade and new auto purchase?"

Watson will learn how to give the client step-by-step instructions tailored to their specific accounting package. Before we work ourselves into a tither about becoming the next telegraph, we have time and opportunity to become approachable. Where we encourage our clients to ask us questions, the more questions, the better.

Putting People at Ease

When it comes to approachability, you may be amazed to hear that most people feel, "My accountant is too busy to be bothered with questions like this."

We need to overcome the negative stereotypes that we're too busy or too expensive. To stay on top-of-mind, we must feel accessible. That means showing we are accessible. We pick up the phone, we respond to emails, we don't abuse gatekeeping.

Does it mean we answer everyone in an instant? Of course not. You need to determine how you will set the bar. It may be different for different clients. But make others feel heard, acknowledge the question and establish a timeframe for replies is often all people want.

By making others feel like we are approachable, they get their questions answered, and they have no need to look elsewhere. They value the relationship and view you as relevant. Focus on making others feel important and valued. They sense genuineness, and they'll keep coming back to you. Particularly, you will find that millennials value authentic relationships. They sniff out what is real, they want that in the fabric of their personal and professional lives.

The Art of Questions

When you become approachable, that is Step One. Step 2 is when things get tricky.

Anyone can answer questions. Answering them in ways that are succinct and asking intelligent follow up questions is the goal. That is where we can outshine a search engine, a voice assistant, or your average competitor. We focus our experience, knowledge and skills to do more than just answer the question. We hear the implied problem and ask the right follow up questions.

Through artful re-direction, we can drive a conversation, clarify the problem, identify gaps and ways to add value. Anyone can ask twenty random questions in reply. That may just generate anxiety with your client. We want to ask the right questions.

- Is now a good time to ask you some questions?
- What is an issue that currently has you at a crossroads?
- What is unresolved right now?
- And, what if we resolved it...what would make the biggest difference in your day, month, or the year ahead?

Big, strong questions solicit information, open hearts and minds, and drive a conversation forward.

When it comes to asking the right question, helping others come to new self-realizations of what they need to accomplish is the ultimate objective. Doling out advice is nice. But guiding others to find answers that uncover things they may be hesitant to confront is the greatest gift you can give. When someone helps us to achieve some new self-actualization, we remember that for a long time. We remain indebted, and we use not only the knowledge gained—but how we came upon it—for years to come.

Leverage this trend, and we can remain or become relevant advisors to our clients as their source for the right answers to what seem mundane, run-of-the mill questions. They may not know those questions are mundane, they may assume so—wrongly. It is our job to ensure that our clients understand there are no stupid questions.

Don't wait for an AI-powered kiosk to poorly answer your client's questions. Be the one with the right questions as answers to their questions. Both you and your client will be glad you did.

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