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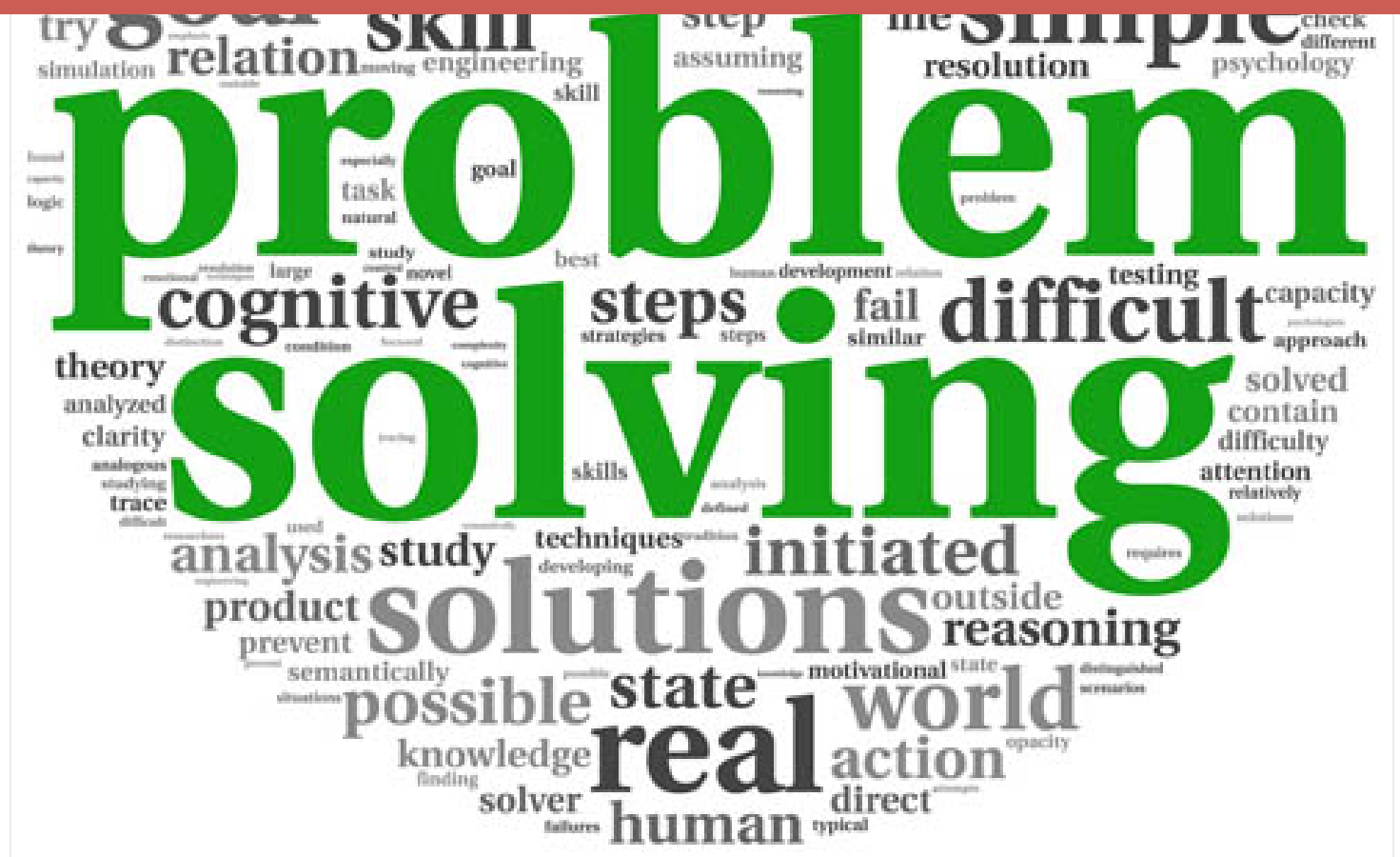
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Garrett Wagner • Apr. 16, 2020

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Instinctively, you pick up the phone on the first ring. Instantly, you are taken aback by the angry voice on the other end of the line. You were not expecting this kind of call, and most certainly not from this client. After all, you did a great job preparing his tax returns—just as you have done for four straight years. So begins the first Monday of the month.

Can you relate to this feeling? Seems no matter how much history we may have with a client, no matter how well a job gets done, every dog has his day. We complete the task. We believe that we have provided service without error. But the client concludes a target was dramatically missed.

Ships pass in the night at companies large or small. Perceptions get misaligned

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There is a way to deliver a more seamless experience. There is a simple trick to help us anticipate and stay ahead of these sorts of misunderstandings that blow out of proportion.

One thing we can do is to shift our focus toward seeking to understand the needs of others and instead of making too many assumptions. Instead, we need pause and clarify with the client, customer, co-workers, etc.

When it comes to understanding each person's needs, this isn't something that is limited to the partners and managers. Everyone on the team can do their part and embrace the concept of having an inquisitive mindset. The inquisitive mindset also appeals to millennials who have a natural drive for greater understanding and knowledge. They may not even have an ulterior motive; they just like knowing things to know them. As an added benefit of improved client relationships, you will engage your millennial-age associates like never before.

So, one way to defuse having one angrier client is to break the cycle doing the same old thing, changing our habits, and recognizing that these times, they are a-changin'. There's a handy acronym, A.S.K., that we can use. It helps to ask the right questions at the right time.

Assess

The first obvious step is taking time to understand the true needs of others.

- What are your goals, your concerns today?
- What do you want as the end result?

Too often we project our goals or those of the last client in the door in place of the client in front of us. For example, when completing a tax return, we may assume the client wants the return completely buttoned up. However, what this client really

wants is to understand if their moving expenses this year can be written off. The fact

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Solve

The second step is being sure to solve the right problem. Because we first assess the situation, we are aiming to get to the bottom of the right problems. Now, we can use our knowledge and experience to solve the right problem. This second step enables us to shift into a truly advisory capacity as consultants, rather than backtracking later. You know what that sounds like: lobbing questions midway through the project as you discover the awkward truths about why you are really here and what the client really wanted.

Some start to blame the client. “Oh, why didn't you tell me?” As you may know that kind of talk never goes over too well. The answer, of course: “Because you never asked. You never ask me anything.”

But if we assess, we can solve and have a clear understanding of what we are being asked to solve before we ever get started.

Keep

As we move into the third and final step, we may be tempted to fall back into our own biases about what we are doing. This final phase is where most go awry. We get pulled into the old temptations. The goal is to keep in mind our initial assessment and execute the correct deliverables.

Remember, this isn't about delivering what you think someone wants or needs—or even what you think is good for them, despite themselves. This is about a communicating with them to understand what they need, advising and informing them on nuances and improvements, then going about creating the solution.

The A.S.K. method's simplicity helps us to truly serve others as trusted advisors. It will set you apart from the vast majority of accountants, for instance, as you shift

focus from the technical to compliance services. And it vastly reduces those surprise,

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