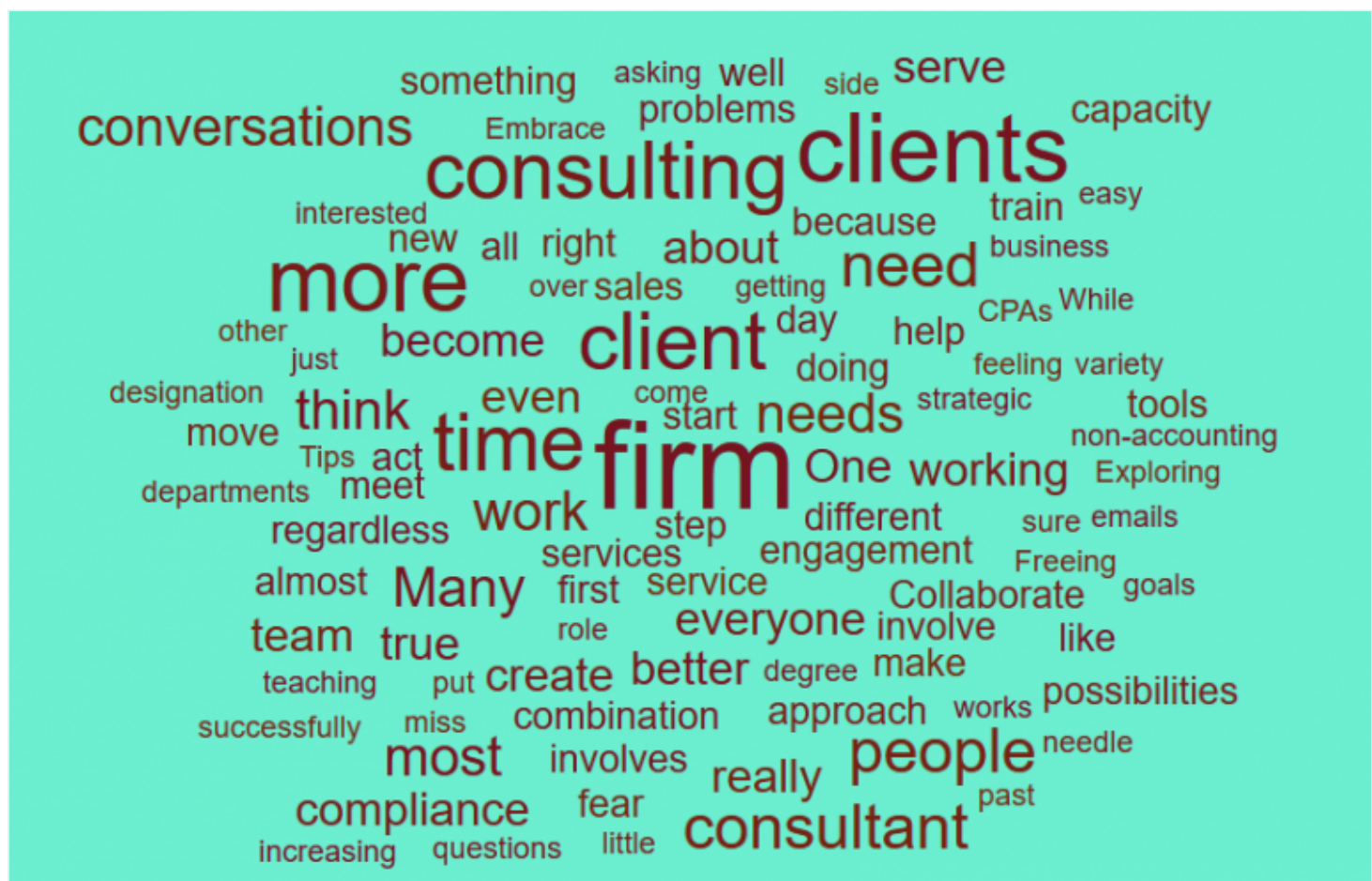


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recognize all of those possibilities and meet client needs.

**Sandra Wiley • May. 06, 2020**



If you're like most firm leaders, you're working on expanding your firm's core service lines to become more consultative for your clients. Firm partners and managers know the technical side of the business. They can teach and train it well. But even if they serve a consulting role with clients, teaching their staff to act like a consultant is entirely different. Many aren't even sure where to start.

In a tax or audit engagement, the scope of services is well defined and documented. But consulting has almost unlimited possibilities. How do you train people to recognize all of those possibilities and meet client needs?

We developed our [Certified Consultant Training](#) to meet a need we saw in the

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Most of us have very little uninterrupted quiet time to think deeply about what our clients really need because we spend so much time fielding texts, calls, emails and more.

There's no one "right" way to create that capacity. For most firms, it involves a combination of technology, process, delegation and prioritization. Whatever combination of strategies works for you, make a commitment to make a change. Freeing up even an hour a day to have more in-depth conversations with clients and really think about how the firm can better serve them can really move the needle in your firm.

## **2. Collaborate**

Consulting is a team sport. It requires a variety of skill sets and backgrounds. To serve your clients in new ways, the people in your firm will need to think and act differently than they do today. This may involve working more closely with people in different departments or siloes. It will almost certainly involve hiring non-accounting graduates. It's about getting the best person for the job, regardless of their degree or designation.

A good collaborative team checks their egos at the door and focuses relentlessly on the goals of the project or the needs of the client.

Invest in tools that allow your team members to collaborate with each other (and with clients) regardless of their location, including cloud-based systems and communication tools. If you don't have these capabilities, your firm will miss out on opportunities.

## **3. Have better client conversations**

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It's rare for a client to approach their CPA with a clear understanding of their problems and how the firm can help. Instead, we need to become adept at asking the right questions and earning their trust. That ability doesn't always come naturally, but it's something that can be cultivated over time.

It's easy to put off consulting conversations when people are busy doing compliance and transactional work. And many professionals fear consulting because they think they need all of the answers. But as a consultant, it's more important to be *interested* and interesting. There's never been a better time to work on increasing your connection to clients and offering them more strategic services. Embrace a new mindset and become a true consultant for your clients.

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By Sandra Wiley is President of [Boomer Consulting, Inc.](#)

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