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While in recent years many accounting professionals have been making the shift from compliance to advisory services, the COVID-19 pandemic accelerated the urgency of this transition. 2020 has created all kinds of new challenges and questions for businesses, and the owners and managers of those businesses have turned to their accountants for answers. Given the unprecedented nature of these challenges, many accountants have found themselves in the position of not having an immediate answer to their client's questions, which raises an interesting and important question for accountants: How do you answer questions about things that

publications and professionals. There are a variety of webinars to attend and articles to read about PPP loans, the stimulus packages, COVID-related insurance and liability issues, and more. It's extremely important to read up on these issues so that you're in a position to guide your clients through these unprecedented times.

Communicate efficiently with clients

The next step is to find an efficient way to stay in touch with clients. It may not be feasible to answer dozens of phone calls and emails every day. You still have lots of other work to do. I recommend setting a dedicated time each day for answering client questions so that you can do your other work uninterrupted. Also, the reality is in many cases your clients would prefer not to hop on the phone or even trade emails.

Using a client portal as your primary method of communication will make life easier both for you and your clients. They're efficient and easy to use, and they provide your clients with transparency so they feel more in the loop. Clients will be able to send you files, see what they owe you, ask questions, and more, so even when you're unavailable to speak with them, they will still see that you're engaged and helping them make progress.

Don't wait

The last and final critical element of moving from accountant to trusted advisor is not to wait for clients to ask questions but to proactively reach out to them with insights and information you know they'll find valuable, answering many of their questions before they arise. Like your clients, I run a business, and like your clients, I don't always have all the solutions to the problems we confront. I rely on a set of advisers—attorneys, accountants, insurance brokers—who provide me with answers to my questions. But the ones I truly find indispensable are the ones who know what challenges I'll face and proactively provide me with insights before they

clients place on advisory services.

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Davis Bell is CEO of Canopy.

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