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Shahram Zarshenas • Dec. 23, 2020



As a CPA firm providing services to businesses and brands, your revenue growth greatly depends on how well you can acquire and retain clients. Finding new customers allows you to drive your income and scale your practice while retaining them helps you keep your momentum.

Unfortunately, service providers today commonly struggle with their client acquisition and retention. Despite offering high-quality solutions, some still find themselves unable to turn prospects into paying clients and, ultimately, into loyal customers.

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What is Client Onboarding?

Client onboarding is a lot like employee onboarding. It's a process wherein you introduce new clients to your CPA firm and your solutions. A solid onboarding system helps familiarize them with your offerings and improve your collaboration. Ultimately, it leads them to become satisfied with your services. It may even convince them to become advocates for your accounting firm.

If you are looking to improve your CX to aid your customer acquisition and retention efforts, here are key tips worth keeping in mind:

1. Don't Stop After the Sale

Many service providers make the mistake of ending the funnel right after they have won a customer over.

It pays to remember that successfully acquiring a new customer isn't the end. In reality, it is the start of another chapter, and it's something that you must do well.

To do so, you need to keep that constant communication with your newly converted clients. Provide them with great assistance—maybe even better than you did before the sale. You must also stay on top of client interactions.

While all of these may sound overwhelming, you can utilize various accounting project management software available today to do these efficiently.

2. Identify Your Key Performance Indicators (KPIs)

It's not enough for you to feel good about improving your service offering and customer experience. You need to determine if your efforts are indeed bringing the

results you need. To do this, you will need to identify your [KPIs](#) and evaluate your

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- Net Promoter Score – This measures the willingness of your clients to recommend your services to others and spread the word about you.

3. Actively Coach Your Clients

A surefire way to boost your client's experience with your accounting firm is to let them truly experience the benefits they can get from your service. Go beyond telling them what they can achieve; guide them so that they will see for themselves.

Through email outreach and constant communication, help them get everything they need in order. Be proactive in sending helpful resources and practical advice. Through consistent effort, you will be able to help them achieve their goals—and this is something that they will always remember you fondly for.

Conclusion

Your work doesn't stop with getting a prospect to say "yes." The next thing to do is to help them become comfortable with your service as quickly as possible; you need to satisfy them by providing an excellent customer experience. Otherwise, you may be pushing these customers away and, ultimately, sabotaging your CPA firm's potential for growth and success.

[This article first appeared at: <https://financial-cents.com/2020/11/30/client-onboarding-boost-customer-experience>]

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As the CEO of [Financial Cents](#), Shahram Zarshenas spends his time helping accountants get visibility across their firm to prevent things from falling through the cracks. Prior to Financial Cents, he founded an investment banking firm that helped software companies scale and exit their business.

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