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Feb. 23, 2021



As a result of the pandemic, most firms are now providing their services over video chat, emails, and phone calls rather than in person. Connecting with clients remotely and building a relationship is essential to a healthy partnership. At the end of the day, our clients trust us with their financials and we commit to providing them with the best services. Below are some insights and tips on how to better connect with your clients while working from home from Intuit ProConnect Tax Council Members.

Tips on enhancing client services while remote

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be scaled properly. I would recommend having enough staff to handle the amount of inquiries from clients if you plan to work remotely, and don't take on more new clients than you can handle. There is nothing worse than taking on new clients that you can't accommodate and providing poor service.

How to build your client relationships during this time

Timothy

Clients often want to feel as if you are reading their minds, but you're not. You're just asking good questions and taking great notes so when it's time to circle back to them with information, you're spot on with your problem solving suggestions. This is a good time to get a little personal. Ask about their family members and how they are feeling. Let them know that you have a true concern about them NOT just their company. This really goes a long way.

Jamie E. O'Kane, CPA, Owner of JE O'Kane CPA LLC

Use video. I feel seeing clients over the screen is extremely helpful and creates a better connection when building a relationship with them from home.

Spend time with technology

Timothy

Make sure you have the best tech stack for your business and for the clients to do business with you. Spend time vetting technology that is needed to be successful in this environment. There are a lot of choices out there so choose wisely and stick with it long enough to experience the good and bad with your tech selection. This will help speed up the evaluation process for the next solution. Remember, you're not going to make the perfect choice the first, second, or possibly the third time. But, one thing should be consistent, the tech you selected gets better and better each time.

Andrew

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Never stop marketing. Let the client and potential clients see that your business is not shaken up by this pandemic or any other thing. Let them see business as usual and bring your A-game.

Andrew

Continue working hard to provide your clients with the best service you can and stay up to date on the latest legislation and updates to make clients' lives easier. I would say the most feedback we have received from clients is how thankful they are for what we do, and what we did in the peak of COVID-19 to keep their business operations flowing as smoothly as possible. There were many days we were exhausted, and frustrated with the ever changing stimulus guidelines and lack of information from the government, but our clients have repeatedly told us how thankful they are to have us on their team. The simple thank you for our business clients makes it worth doing what we do.

Jamie

Scheduling our deliverables with a client video call has been a game-changer for productivity and completion. It helps to set concrete deadlines, while also allowing a specified time to talk through feedback and updates with clients.

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