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Amy Vetter • Jun. 14, 2021



The biggest stereotype about accountants is that we're dry, boring numbers people. If you buy into the popular image, the perfect accountant would be an emotionless number cruncher, scarcely different from a high-powered computer. But nothing could be further from the truth. There is a human side to accounting, especially when it comes to delivering **advisory** services to your clients. If you want to improve as an

advisor, your first step is to look at genuine human connection in addition to the

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ways to develop and capitalize on personal bonds in order to better serve your clients.

Understand their purpose and values

Of course, every business wants to make money, but profit is far from the only driver for most SMBs. Your clients also base operational decisions on their purpose and values as a company. Understanding these important motivators gives you a greater sense for what is intrinsic and integral to a business and what is superfluous. In other words, it lets your clients know that you *get* them.

Let's say you have a client looking to cut costs, as many businesses are right now. They've recently implemented a **DEI** program, one that is relatively costly and hasn't yet made a direct contribution to their bottom line. However, creating a more equitable workplace is a huge part of their business and one they're not willing to compromise on. If you know how important DEI is to them, you're never going to ask them to scrap the program. By going through their books and finding other ways to decrease spending, you let your client know that you're on the same team, which is what great advisory is all about.

Leverage your own experience

Firm owners and leaders have an obvious parallel to their clients in the form of their own professional lives. As a firm owner or somebody in a leadership position, odds are you've struggled with many of the same issues as the businesses you serve. Many business owners are not prepared to deal with firing someone or cancelling a planned initiative, but if you've been there before, you can coach them through the process.

Last year serves as a perfect example. As businesses scrambled to apply to [PPP](#)

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type of confidant a business owner can lean on for decades. Over the course of such a long relationship, it's only natural to learn a little bit about the people you serve—and to share a little bit about your life outside of work. It may not seem like a value proposition to know where your clients' kids are applying for college, their favorite food, or the TV show they can't stop bingeing, but over time, these little pieces of information strengthen the connection between firm and client.

When you have the chance to discuss personal matters with your clients, don't shy away from it. A business does not operate in a vacuum. The people who run it are full-fledged human beings with emotions, just as surely as you are. Acknowledging this aspect of business rather than trying to minimize it is an essential facet of providing well-rounded advisory services.

So is accounting about numbers? Definitely, but that's far from all it's about. Advisory services are about a deep familiarity with all aspects of your clients' businesses, from the numbers to that which can't be defined by them.

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