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By Judie McCarthy.

Working remotely is forever changed thanks to the lessons learned through COVID. But still, many firms have an aversion to change because clients are creatures of habit. Even if new technology can streamline operations and make it easier for clients to work with your firm,, there's often hesitation before adoption. After running my own accounting practice and working with many accounting firms, I have seen how firms struggle to guide their clients through technological changes.

If you've struggled with this yourself, you're not alone, but also know there is hope –

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- Understanding the purpose and benefits of changes
- How to systematically guide clients through technology changes
- Steps to take to nurture clients through these changes

Understand the Purpose and Benefits of the Changes

If you're not 100% positive of the purpose and benefits of these changes, you can't expect your client to be on board with them. Before you recommend changes, do the following:

- Define the purpose of the change
- Outline the benefits of the change
- Jot down how these changes benefit the business

Once you're clear on the purpose and benefits of the changes, you'll need to create a plan on how to properly guide your clients through these changes. Every firm's plan will likely look a little different; however, between running my own firm and working with many accounting firms, I've come to find there are a few key elements essential to all plans when guiding clients through technology changes. Let's dive into those now.

How to Guide Clients Through Technology Changes

Step 1: Start with the Right Clients

First, don't start changes with problem clients because they'll likely discourage your team and slow the process down. Instead, begin with non-problem clients and write

down some of the characteristics that make them *good clients* so that these are the

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- When framing the “why,” be sure it relates to not just you but also *them*. For example, the solution may be faster, more cost-effective, and more secure.
- Frame the *how* in advance, too. Lay out each step the client needs to take to adopt the change, timelines, impacts, and processes.

At Client Hub, we have firms go through an onboarding process to ensure that when they and their clients use our platform, both the firm and their clients are confident and fully understand the benefits.

Step 3: Onboard and Monitor

Onboarding and monitoring are crucial to successful changes. You should have processes in place that:

- Track the onboarding process
- Send reminders if invites weren't accepted
- Offer help when clients seem to get stuck
- Verify that the client knows how to use the platform
- Etc.

Through monitoring and onboarding, it's possible to help clients overcome any adoption issues they may have.

Step 4: Provide Training

Depending on the technology that's being used, it may be worthwhile to:

- Offer training

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adoption too quickly, you'll have a lot of resistance from clients. Instead, listen to the experts here and understand that forming habits takes time, typically at least **18 days**.

You want to be flexible with transition periods to be as accommodating as possible for your clients. That being said, consider avoiding setting a period of adoption beyond 30 days because you do need to create a sense of urgency.

Tips for Implementing Changes

Implementing changes can be tricky – I get it. Many firms are scared to make changes to legacy clients because they're afraid that these changes may:

- Not be welcomed by the client
- Lead to clients leaving

However, it's also unfair to treat new clients differently from existing clients. You want both to have the opportunity to use cutting-edge technology.

Also, if the entire firm uses the same solution, it's better for your business. You can create operating procedures across engagements that empower your team when working with clients.

Implementing changes goes back to knowing what's best for your client. When you introduce a change, you're not asking too much of your clients to try them out and switch. It's a *lot* harder to change accountants than it is to adapt to new changes that are better in the long term.

A few tips I recommend for implementing changes are:

- If clients are resistant to change, adjust your communication. Ask the client

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clients, so it's time to consider the cost of them.

- Is it worth dealing with a time-consuming client who doesn't respect your recommendations or changes?
- Bad clients can hinder firm growth and stop you from implementing key changes to your operation.
- Your time and sanity are more valuable than dealing with a client that refuses to adopt key changes that can help their business grow.

You need to do what's best for your business and clients. Unfortunately, you may need to let some clients that won't adopt changes go because they're holding your firm back.

Final Thoughts

Change can be difficult, but with the right processes in place, it doesn't have to be. The tips above are from firsthand experience running my accounting firm and helping many accountants successfully implement cutting-edge technology like Client Hub into their practice. Over time, I'm confident that you'll find your own steps and processes to help nurture technology changes with your clients.

If you would like to learn more about managing nurturing clients through technological changes or Client Hub, [click here](#).

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Judie McCarthy is a QuickBooks ProAdvisor (Advanced Certified), speaker, author, experienced accounting professional, and co-founder of Client Hub. Client Hub is a one-of-a-kind, all-in-one web-based, frictionless workflow and client collaboration tool built for accounting professionals. Client Hub takes communication out of

cluttered, unsecure email inboxes and into a secure, firm branded workspace. To get

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