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to consistently deliver more than what your clients are looking for and anticipate their needs. You'll start to see more referrals than ever before.

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While there are plenty of ways to [find new clients](#), word of mouth is probably how you're getting most of your business. Why? The reason is simple.

Finances are built on [trust](#), and people are most likely to trust someone a family member or friend recommends. That's why most tax and accounting professionals thrive on [referrals](#). But is that the best way to grow your practice?

While referrals can be unpredictable, they tend to be your best source of new

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1. Find more referrals with a mindset shift

Getting consistent referrals can be challenging, even for the strongest business. But it all starts with your mindset.

It's easy to think about how to encourage your customers to recommend you. For example, you could offer a discount for each new client or ask clients to suggest friends who might be interested in your services. However, these heavy-handed techniques often don't work as well as you'd hope because of the psychology of a referral. Someone who recommends your business to a friend isn't looking for a personal perk, but for excellent service their friend will like, too. That's why external rewards don't always generate the referrals you would like.

Instead, personal recommendations happen when clients are happily surprised at the quality of service you offer. The main driver of more referrals is providing remarkable service.

To grow referrals, consider a mindset shift; instead of looking for new ways to generate business, start with your services. Consider how you can treat clients well and provide extra value. They'll want to recommend you to others without additional nudging.

2. Overshoot your goals

You're a competent professional with excellent qualifications, a great work ethic, and services that keep clients happy. Isn't that everything clients want?

Well, yes and no. The challenge is that today's clients have access to almost any professional on the internet. Friendly treatment and competent skills are the expectation, not referral-worthy service. And since most clients don't particularly

look forward to accounting or tax preparation, they're even less likely to recommend

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You might need to overshoot your goals to impress clients, and the best way to do that is by under-promising and over-delivering on the service you offer.

For example, create a visual [timeline in Google slides](#) or a [graph in Excel](#) to easily communicate expectations with your client, then deliver results faster than what you predicted, and show that visually on the timeline. Or, surprise clients with taking the extra mile to revisit all possible deductions, and make a recommendation on how to get a bigger refund next year.

Another idea is surprising them with boutique customer service they are not used to with a small thank-you gift.

Consider each step you take with clients—consulting, handling their work, and delivering a final product. Brainstorm ways you could offer something unique and unexpected at each stage. Don't limit yourself to over-delivering only when you're providing services. You can keep clients impressed and engaged every week.

3. Create a newsletter to keep clients informed

Getting more referrals is often a question of staying top-of-mind with your clients.

Sure, a client might recommend you to friends during tax season, but when their hairdresser mentions months later that she's looking for tax help, does your client think of you? Or, do they just nod and forget the question 10 minutes later? This is why one of the secrets to more referrals is staying fresh in the mind of your clients.

One of the best ways to do that is with a [newsletter](#), and while it doesn't seem to be a “surprising” tip, if it's done right, it works. A newsletter isn't about selling your services—it's about providing valuable information. For example, Romeo Razi at [Taxed Right](#) shares a newsletter about tax tips and strategies that can be used throughout the year.

In 2022, financial services had an average [email open rate of 21.29%](#). That means one

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and when, but as you grow, this becomes impossible. There are too many clients, each with unique and changing needs who are looking for [personalized guidance](#).

A customer relationship management (CRM) platform is the first step to a synchronized system. You can track customer data and information in a single place your entire team can access.

Employing a [business VoIP solution](#) is the most critical part. Instead of having messages and data scattered across email, phone, and everywhere else, you can keep it all in one place. Integrate your communication software with your CRM and keep all your sales, marketing, and work on the same page.

You can learn important trigger points for clients and keep up with them with perfectly timed messages. Internal communication software keeps all conversations in one place, so anyone on your team can easily reference what you've already talked about, whether by phone, text, email, or something else. This kind of personalization shows your client they're more than just a number.

5. Pay attention to the emotional side

Finances may be all numbers, but clients think and buy emotionally. For every one of your clients, their money represents hopes, dreams, and fears. Tapping into the emotional side of their financial needs builds a connection that generates trust, a better working relationship, and more referrals.

If you usually focus only on business, don't be afraid to move beyond small talk on personal issues. Learn about your clients' family life, personal and financial objectives, and take those goals into account when helping with finances.

Once you learn what they want to improve in their lives, you'll have a much clearer idea how to help them. For example, a young couple planning on starting a family

have very different financial needs than a couple who wants to [retire](#) early.

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Just as a doctor can help diagnose issues before they become urgent, use your experience and judgment to prevent trouble areas that might lie ahead for your clients.

For example, [identity theft](#) is a threat every taxpayer faces. Helping clients think through their identity protection, and what software or services they use to [protect their identity](#) and records, is a good first step. Walk clients through ways they can prevent identity theft so they can monitor themselves and take steps to ensure their identity isn't stolen.

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Start taking notes on common follow-up questions if you're just starting or not sure what issues your clients commonly face. Your CRM can be a helpful tool to measure common issues after frequent questions.

7. Launch a blog or podcast

If you want a larger audience—or just a steady stream of new clients—start creating content. Two of the best ways right now are to write a [blog](#) or start a [podcast](#).

Whatever kind of content you create, you can share ideas, tips, and your opinion on relevant financial issues. You can also share behind-the-scenes explanations of the strategies and processes you use to help clients.

A podcast is a phenomenal way to build a relationship with existing clients. You can even bring them on as guests and feature their success stories. By putting the spotlight on your clients, you make them the hero and show prospective clients how you can help.

Remember that the most successful content focuses on a specific audience. If you

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what you already do.

Put the spotlight on your client, and find ways to anticipate their needs. Help with your expertise and guide them in other areas, even if they're not related to finance.

By far, the most important factor is consistency. Instead of trying all the techniques on this list at once, focus on one or two that make the most sense for how you currently run your firm. Make them happen consistently, and you'll start to see results.

Top-quality service isn't a one-time deliverable, but a long-term habit. Make a point to consistently deliver more than what your clients are looking for and anticipate their needs. You'll start to see more referrals than ever before.

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Editor's note: Dmitry's tip on podcasts is timely for tax and accounting professionals. Check out [AccounTrends](#), a new podcast hosted by Jasen Stine and sponsored by Intuit Accountants.

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Dmitry Dragilev is founder of [JustReachOut.io](#), a software tool that has been used by 5,000 businesses to pitch journalists and get featured in the press, all on their own without PR firms. Dmitry also runs [PRThatConverts.com](#), an online PR & SEO coaching program for businesses that want to learn, and do, PR & SEO on their own. Since its inception, this program has helped 800+ students from 25 different countries. In a not so distant past, Dmitry used PR & SEO to grow multiple startups from start to acquisition by Google. More about his story and his latest articles on his blog, <https://www.criminallyprolific.com>. Find Dmitry on Twitter @dragilev.

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