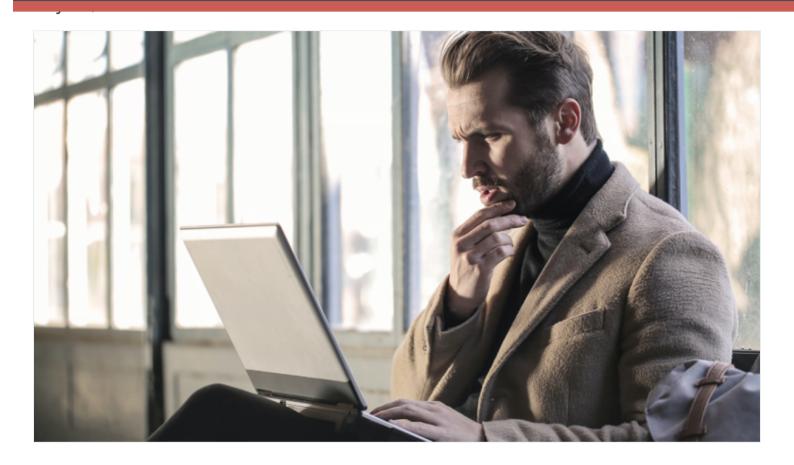
#### **CPA**

#### Practice **Advisor**

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"Behind every good business is a great accountant." And behind every great accountant is ... a reliable payroll partner provider? Not exactly. Your payroll partner should be so trustworthy, reliable, and all-around grounded that they work from the shadows. It's your practice and reputation, after all. They just help you shine.

But if your payroll provider is getting a little too much time in the limelight, it might be time to call it quits, create your checklist of payroll provider must-haves, and move on to a drama-free partner.

## 3 Reasons it's time to look for a new payroll partner

Sure, there are a number of reasons you might be toying with the idea of ending your partnership with your current payroll provider.

But if you're experiencing one or more of the following, you may need to make the

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provider, snouldir cyou have someone you can councon, too:

If your support-related frustrations are making you think twice about your current payroll partner, you're not alone. Getting insufficient support is a major reason that customers or clients leave a business. In fact, as many as 78% of consumers would switch brands after multiple bad experiences (and 61% would switch after just one).

You may be tired of dealing with bad experiences like:

- Being on hold for extended periods
- Dealing with too many robots (75% of consumers would rather have humans)
- Not being able to contact support through your preferred method (e.g., phone, email, chat)
- Speaking with representatives who aren't knowledgeable
- Going through transfer after transfer

Your time is money. So whether you've had one or multiple support-related frustrations, it may be time to move on.

But here's something to consider before leaving your payroll partner on account of mediocre support: *The grass is only greener in select locations*. Only 49% of U.S. consumers say companies provide a good customer experience today. Ouch.

Strong customer support may be getting rarer to find, but it's not impossible. Before jumping ship and partnering with a new provider that makes you feel like you're living in the twilight zone, be sure to:

- Read through testimonials on review sites (e.g., Trustpilot) to find out what kind of experience other accounting professionals have had
- Try it out before partnering (contact the potential provider to get first-hand support experience)

#### 2. It's not a good solution for your clients

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- It's overly complicated (if your clients are running their own payroll, they don't want to take a weekend for software training)
- The features just aren't there (time-saving features, where are you?)
- It doesn't integrate with accounting or time and attendance software (the software should be reducing manual data entry, not requiring it)
- The reports are a little lackluster (shouldn't you and your clients be able to create, download, and print reports in a few clicks?)
- There are inaccuracies (a major red flag—there should be a tax filing accuracy guarantee)

It doesn't have to be this way! Partnering with a payroll provider is supposed to make your life—and your clients' lives—easier. So if the software isn't a good fit for your clients, it ultimately won't be a good fit for you.

### 3. You could get better partnership benefits elsewhere

Feel like you're putting in all the work and not seeing the benefits of the partnership? If the partnership seems a little one-sided, you may need to reconsider whether it really lives up to its name or not.

There's more to a designated partner program than just the name, after all—much more. You should also be receiving unique benefits for choosing that payroll provider to trust and partner with.

As your partner, the provider should be committed to helping your firm (and your clients) grow through benefits like:

- Discounted pricing
- A dedicated team to help you get set up with the software
- An easy way to switch between client accounts

• Special reports to quickly access your clients' data

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# Partnering with a new payroll provider

Deciding to leave your current payroll partner could come with a slew of benefits for your practice. But it's just the first step.

If you're thinking about breaking up with your payroll partner, you'll likely follow these four basic steps:

- 1. Make the decision to leave your current payroll partner
- 2. Find a new payroll partner
- 3. Communicate the change to clients and migrate your data
- 4. Enjoy the benefits your new payroll partner has to offer!

Your next step? Finding a new and improved provider to partner with. And with so many solutions out there, making that decision can be time-consuming and difficult (and may even cause you to drag your feet). After all, you don't want to keep switching every few months—you have data to migrate and clients to inform.

To help you in your new payroll partner decision, we made a checklist of must-haves that covers key things to look for, like a dedicated partner to help you onboard clients, an umbrella login, and positive testimonials.

Use our checklist as is or as a starting point for creating your own (we won't be offended). You can download our free checklist here.

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