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quest for productivity and efficiency, we often inadvertently neglect to weigh our client's experience of the tools in our tech stack.

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By Twyla Verhelst, CPA.

Moving to the cloud and embracing ever-evolving tech has revolutionized the accounting industry, and even changed what it means to be an accountant. Tech makes firms more scalable and productive, and means accounting services are available to more clients. In our enthusiasm for all the amazing, valuable ways that technology has transformed accounting, have we stopped to consider how our tools affect our client's experience?

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Thinking in Terms of Added Value

The firm benefits when work can be done faster. The accountant or bookkeeper benefits, too. And the client? The truth is, the client doesn't get *more* value by the accountant doing the work at a faster pace. Whether the accounting professional completes the work in 5 minutes or 5 hours, the value of the deliverables is the same. But consider this: When the accounting team introduces technology that actually elevates the client's experience, is straightforward to use, efficient and refreshing—and that's what moves tech into “added value” territory.

Don't Overlook Client Experience

In a market flooded with competition, client satisfaction—and retention—is no joke. Being largely referral-based, accounting firms can't afford to overlook a single step of the client's journey and experience: The happiest clients are the ones who will share their experience with others and introduce their friends and colleagues to the firm. Nurturing a referral stream saves the firm money that would otherwise be spent on marketing, and saves hours of time used to chase leads. And perhaps most importantly, a referral system can make it easier to find quality leads that are a fit for the firm's values.

Don't Let Your Tech Devalue Your Firm

If we serve up a tech experience that feels inefficient, cumbersome, or uncomfortable, the very experience of using it—or struggling to use it—can decrease the client's perceived value of the firm's engagement with them. Even when it's a tool that many people find user-friendly, or one that you love using yourself—If the client doesn't enjoy using the tool, for any reason, their bad experience can carry over to the relationship with the firm. Not to mention, a client who is struggling to use the tech

placed in front of them is likely impacting the accounting team's ability to carry out

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patient explanation, they're more likely to understand how the tool will relieve their pain point. They also need to see how the tool indirectly benefits them. For example, it may first solve their pressing need for accurate bookkeeping, but the right tool will even help clients understand their financials at a deeper level and ensure they have up-to-date data available to make financial decisions on the spot—invaluable benefits for the business's decision-makers.

Recognizing When It's Not Working

For many business owners, raising concerns about tech challenges can be wrapped up in emotion. It's not easy to admit, especially if the client fears you might no longer want to work with them, or believes there isn't another option to explore. Don't expect clients to come to you first—regularly check in to showcase that you care about their experience, and be proactive about offering training sessions and resources to support their adoption of any tech you'd like them to use.

When Clients Embrace the Tech

Imagine what could be possible if your client truly enjoyed their tech, and in turn could understand what they're looking at? What if they felt empowered when it comes to their finances? When clients are matched with tech tools that help them understand the intricacies of their own business, they are able to grow more engaged in their finances, and their relationship with their accounting team can carry new meaning and possibility.

Twyla Verhelst, CPA, is Head of the Accountant Channel at [FreshBooks](#).

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