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and change your client relationships from transactional to transformational.

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By Kristen Keats, CPA + Renee Daggett, EA.

For tax professionals, “advisory services” is a term that can be both vague and intimidating. However, it’s highly likely that you’re already providing these services without even realizing it.

Think about this: If you’re completing a tax return for your clients and mention retirement plan options to them, that’s advisory work. If you’re exchanging business

updates with a client and offer insights into tools like bookkeeping softwares or

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Build Your Client Community

Establishing your advisory role starts with building a culture of communication and support within your client network.

When starting out, small business owners often do not have a community to rely on to exchange ideas, discuss techniques, or get honest critiques on their practices. So, as someone who serves other clients in similar positions, they'll look to you as a lifeline for real industry insights and actionable advice.

This is your opportunity to be a helper, and use your position as an advisor to answer questions on everything from tax compliance and financial planning to technology and human resources. You may not realize how much you know until you take stock of the business knowledge you've gained from simply chatting with your clients.

The more you can apply this transferable knowledge, the easier it will get to transform your relationships and anticipate what one client will need based on another. It will also make the value of your advisory services more pitchable to clients who think they only want tax compliance work.

Find Your Firm's Culture

As you grow your confidence within your client network, it's crucial to be intentional about the culture you wish to foster in your own firm as well.

After two years of transition, first with leaving the office and now with combinations of remote and hybrid work, most firms have finally settled into their long-term working structures. Whether you run a small remote firm or a larger operation with an office, now is the perfect time to assess how your culture impacts your hiring and staffing goals.

While it's important that someone can reconcile a balance sheet or file a tax return,

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Transform With Technology

Technology is the glue that will ultimately enhance advisory efficiency for both your clients and your team.

For remote teams, using collaboration tools like [Loom](#) and [Miro](#) are so important to make people feel like they're working together, not alone. While you don't want to have too many meetings, these tools allow teams to easily meet with managers for 1:1s, departments, and the whole team. For client services, [QuickBooks Online Accountant](#) will allow you to manage and organize tasks asynchronously, all on the cloud.

If you don't consider yourself "tech-savvy," incorporating new tools may seem daunting. But in order to keep innovating your business and not be left behind, you need to be willing to embrace change. Move slowly but intentionally. When you find a technology solution you may work for you, vet it first and then slowly start to implement it in your firm (be sure this happens after tax season — don't start in January).

Be aware that whenever you're adopting something new, there will be a hump to get over. Anticipate this initial learning curve and set a timeline of expectations so you don't become discouraged. Then, using this timeline, evaluate the technology and don't be afraid to draw a line in the sand when something is not the best fit for your firm.

You'll know you've found the right technology when collaborating with your clients and team members takes a few clicks.

Conclusion:

Crunching numbers is often the safe space for tax professionals, so it's no surprise

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