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on the most crucial tasks, such as increasing their company's revenue.

Lyle Solomon • Nov. 04, 2022



The year 2022 will end, and we will move on to another year. Every year, we go more into the digital world. CPAs now have to accommodate this new digital way of communication with their clients.

Various changes have occurred in how businesses communicate with their clients in the last few years. Because of the pandemic, many companies had to move to a digital

environment to conduct their business. So, to connect with their clients,

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There have been instances where customers have left businesses because of a lack of personalization. With the help of a robust Customer Relationship Management (CRM) platform, customers can receive a personalized and befitting CPA-client communication experience.

With a CRM like this, CPAs can keep track of birthdays, anniversaries, past conversations, and clients' communication styles. By doing this, CPAs can tailor communication with their clients.

Personalizing client communications is crucial for inferring information clients might not voluntarily share with their accountants. For instance, a CRM system can make notes if a client is dealing with student loan debt to provide the client with debt relief options. In the same way, CPAs can provide help by looking into the data collected by the CRM platform.

Hybrid communication

Before the pandemic, marketing and promoting stages for CPAs were usually at local events like a child's baseball game. Personal interactions are a one-up that helps build relationships and turn clients into loyal customers.

As video conferencing becomes the new face-to-face, some CPAs worry that online interactions will cost them business. Even though clients are shifting to a digital stage, traditional word-of-mouth strategies are still effective.

For example, CPAs can approach prospective clients at a local event and talk to them, but what happens afterward is the main thing.

Because of the personalized CRM, accountants no longer need to manually follow up with potential clients after entering their information into a CRM. They can easily

nurture relationships by setting up automatic communications that reach out

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like email newsletters, text messages, and pre-recorded phone calls.

CPAs can sell their services more effectively by sending pre-written messages to clients and potential clients at set times through drip campaigns.

Using these resources, CPA firms can be innovative in promoting their products and services. A weekly newsletter or video series explaining evolving tax regulations may be helpful. This added value has increased brand recognition, strengthened existing relationships, and encouraged the creation of new ones.

Transparency and better collaboration

When information is spread across various channels, like emails, messages, shared documents, etc., it makes it harder for the company to be open. Vital information gets lost in conversations when unnecessary emails or messages are exchanged between clients and service providers.

CRM tools help employees with their basic data management needs and make it easier for staff members to work together all the time. The platform serves as the team's unified information hub, allowing them to see how their work impacts the company. This leads to a drop in the number of data units, [better communication](#), and more work done by a team.

This is crucial in a virtual workplace to guarantee that all employees are on the same page.

Integrated communication

Most of the time, CPAs communicate with their clients through email. However, they soon realized there were more [effective ways to keep track of client information](#). A

CRM platform can add more context by integrating emails like Gmail and Outlook.

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As the busy season approaches, having all this information in one place helps CPAs make better decisions and build stronger relationships with their clients.

Bottom line

Accountants can strengthen their relationships with existing clients and attract new ones by consistently going above and beyond for them. They can keep clients by tailoring their services to each individual's needs and concentrating on the most crucial tasks, such as increasing their company's revenue.

Accountants have a lot on their plates during tax season. That's why they should keep in mind the need to fulfill their clients wherever they are and adjust to their changing expectations without compromising the efficiency of their processes. CPAs should use CRM and marketing automation strategies to get a real return on their investment.

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Lyle Solomon has extensive legal experience, in-depth knowledge, and experience in consumer finance and writing. He has been a member of the California State Bar since 2003. He graduated from the University of the Pacific's McGeorge School of Law in Sacramento, California, in 1998 and currently works for the [Oak View Law Group](#) in California as a Principal Attorney.

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