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Jon Hubbard • Nov. 30, 2022



Many firms focus on improving their client onboarding process, but there's a crucial step that must happen before client onboarding: deciding whether to take the client. This is a step we like to call client intake.

Despite its importance, few firms put much energy into optimizing their client intake process. They identify their ideal clients, spend time packaging and pricing their services and hone their marketing messaging. But with a weak intake process, they

bring in clients that aren't the kind of clients they want or need to grow the firm or

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It's common for every partner in the firm to have their own definition of the ideal client. For example, one might only accept 1040 clients if there's a related business return, while another accepts any individual tax client willing to pay a minimum amount. The problem is, all those clients utilize the same firm resources, so you need a firm-wide definition of "acceptable client."

What services do those clients purchase? What is the anticipated annual fee? What industries or niches will you work with? What's the client's minimum annual revenue to work with you? Get very clear on the types of clients you will and won't take so there's less confusion amongst partners and staff.

Step 2: Centralize the intake process

When every partner and manager handles the intake process for their own referrals and prospects, it's tough to adhere to the rules established in step one. You'll have much better results when you centralize the process as much as possible.

Bring in a person or a small team to pre-screen clients. When a potential new client calls or fills out an interest form on your website, they're routed to this team for pre-screening.

Your pre-screener doesn't have to be an accountant—they just need to ask questions based on the criteria you've established. Many firms leverage marketing or admin team members for this step in the process. Then, if the prospect meet these basic qualifications, the pre-screener can schedule a meeting with a partner or manager who can dive deeper into the prospect's needs.

Step 3: Determine how you'll communicate to

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It can be as simple as, "Thank you so much for reaching out. After reviewing your info, we believe you'd be better served by {XYZ firm}. We're focused on {your focus niche or services}. If at a later date you need those services, we'd love to have another opportunity to work with you."

While we support establishing a minimum price, that should be an internal metric rather than something you communicate to prospective clients.

Step 4: Watch out for "aspirational" client acceptance

We recently worked with a firm on their strategic planning, and client acceptance was one of the issues that came up during our discussions. One partner in the firm was taking on all kinds of wrong-fit clients. When asked about it, they said they accepted these clients because they could turn into ideal clients.

However, when we asked how many of those wrong-fit clients had blossomed into ideal clients, they couldn't name one. Yes, they'd increased fees for these clients over the years, but they were still underwhelming and required a lot of work for a very small percentage of the firm's annual revenues.

Watch out for the tendency to accept wrong-fit clients hoping they'll win the lottery or be the next unicorn startup. If they're the wrong fit today, they reduce your firm's capacity to go after and serve today's ideal clients.

Many firm leaders have been guilty of growing their firms in a way that makes work and life more difficult for them and their team members. Any firm can grow—the goal is to grow smarter, not harder. A strong client intake process ensures you achieve the right kind of growth.

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