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FIRM MANAGEMENT

How Your Firm's Digital Client Experience is Directly Related to Staff Happiness and Productivity

The challenge facing professionals today is that practitioners from all firm sizes are having to spend too much of their time doing low-value administrative work, instead of ...

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When asked why they went into the profession, most accounting professionals will answer, “Because I want to help my clients succeed.” It’s true that the accounting profession provides great career paths, with lots of interesting things to work on, but the biggest thing that motivates accounting professionals is their big hearts.

The challenge facing professionals today is that practitioners from all firm sizes are having to spend too much of their time doing low-value administrative work, instead of being able to focus solely on the joyful work for their clients.

Experts estimate that many accounting professionals are spending up to 40% of their time just gathering client documents. This low-value frustrating work includes chasing clients, searching for documents internally, opening and closing numerous emails and folders, and asking colleagues if they have the necessary information. It’s an incredible amount of time wasted (up to 5 MONTHS of time per year, per staff person!) and is frustrating for all concerned.

So why all the admin? And why is it just “accepted” in firms?

Like most complex challenges, the root cause cannot be determined until the question WHY is asked 5 times. Let’s see how this plays out in an accounting or tax firm using “chasing clients for documents” as the primary challenge we are seeking the root cause to.

Question 1 – *WHY are we having to spend so much time chasing clients for documents?*

Answer 1 – Because clients are late sending them.

Question 2 – *WHY are clients late sending the documents?*

Answer 2 – Because they do not respond quickly to our emails asking for them.

Question 3 – *WHY do our clients not respond quickly to our emails?*

Answer 3 – Because it’s not easy for them to reply.

Question 4 – *WHY is it not easy for them to reply?*

Answer 4 – Because they are usually at work when they get our emails.

Question 5 – *WHY can't they reply when they get our emails at work?*

Answer 5 – Because when they receive the email, they are serving their own clients, often they are on the go, and all they have in their hand is their phone. They don't have access to the documents they need, they don't have a scanner, and therefore they cannot respond until later. In the meantime, our email drops down and down in their inbox.

The root cause of clients responding late is that the method of asking (email with a link to a portal) does not match their busy mobile lives.

Firms should carefully consider the digital experience they offer their clients because it can be the reason for staff having to waste so much precious time. If the firm's client base is made up of clients who are on the go all day, asking them to use a method that requires them to be at their computer or in their office will immediately create a delay in response time.

Walking in the clients' shoes can be a very helpful exercise.

Here is what happens when the client receives an email from the firm, requesting documents. They open it on their phone and immediately know that they cannot reply. The documents they need are not at hand and most don't have a scanner (in the case of paper documents that need to be sent). So, they read the email, close it and mark it unread, and make a "mental note" to do it when they are back in the office. In the meantime, more emails flood in and the firm's document request email drops down and down until it's out of sight, out of mind.

The staff person responsible for the engagement is then forced to "badger" the client until the client finally finds time to send the documents. At that point texted photos of the documents may be the best they can do, and the practitioner is happy to get them even though it now means a lot of extra steps to get them into a usable PDF.

A focus, therefore, on the digital experience offered to clients can make all the difference in creating happier, more productive staff. Moving off email as the primary method and onto a mobile "all in one" app that allows clients to quickly see what the firm needs, and respond in the moment, is a huge win for staff and for clients. [Liscio](#) is an excellent choice to solve these challenges.

Once this is in place, speed and collaboration soars. Client documents, e-signatures, answers to questions, tasks, etc all combine into a single source of truth for staff. With everything coming into one secure place, searching time is significantly reduced and staff can spend their time doing the actual joyful accounting, tax and advisory work for clients, instead of chasing them for items or information needed.

Giving clients an outstanding digital experience when working with the firm can be transformational. Because of the diminished admin time for each staff person, capacity increases. The firm is positioned to take on new clients or add deeper-level services for existing clients. Clients are happier, and most importantly the firm's staff are happier too, because they now get to spend their days helping clients to succeed by focusing on the joyful accounting, tax and advisory work.

Make a plan in 2023 to give your clients an easier way to work digitally with your firm. All boats rise when you give clients a secure solution that is drop-dead easy for them to use and is mobile-enabled. By doing this, you become the “accountant in their pocket!”

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