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TAXES

How Client Conversations Can Turn Tax Season Into Opportunity Season

This offers ideal opportunities to strengthen client relationships and even potentially put better processes and procedures in place ahead of next year's tax season.

Jeannie Ruesch • Mar. 27, 2023



For many accountants, busy season can certainly feel more like “survival season” – last year, [nearly 200 million individual and business tax returns were filed](#), with accountants shouldering a large portion of the work. Now, with accounting firms facing talent shortages and growing workloads, the effort required for this tax season may seem positively Herculean.

However, there is a (very) small silver lining for tax season – the chance to connect with clients you may not often have the chance to speak with. These client meetings may only happen once a year, but they offer ideal opportunities to strengthen client relationships and even potentially put better processes and procedures in place ahead of next year’s tax season.

How can accountants maximize the benefits of these brief client conversations? It starts with listening “between the lines” to identify client challenges and exploring how your firm can help.

To be clear, one Zoom meeting isn't going to magically strengthen relationships with clients. Rather, it's more about setting up regular touchpoints that show the value of your strategic advice throughout the entire year. Actions speak louder, after all.

Keys to Listen for in Conversation With Clients

For accountants to properly provide an enhanced level of client service (and potentially develop growth opportunities), it's important to be on the lookout for the rare opportunities for facetime with clients who might only surface once a year. What you hear and learn in busy season is incredibly valuable, and it all comes down to how you listen.

It's not enough to ask your clients what their pain points are, because there are going to be instances where they don't even know. Instead, view conversations with clients through a service-oriented lens at all times. There are certain key terms or comments to listen for during client conversations that hint to whether a client may be in need of more assistance. This could include comments about:

- How long it took to gather information
- Difficulties finding necessary documents
- Worries about inaccuracies in data
- Feeling behind on workload or being understaffed

Each of these comments represents a struggle you could potentially step in to help mitigate problems. Just be ready to recognize pain points and react appropriately to what you hear.

These conversations can also be framed as a demonstration of an accountant's proactive work to protect clients. According to recent data from the [Federal Trade Commission](#), banks saw an increase of 84% in check fraud in 2022 fueled by security gaps in the US postal system and apps like Zelle and Telegram that make it easy to send money and share sensitive data. Accountants should consider working with their clients to ensure they are following proper cyber security best practices in order to mitigate potential risk.

Leveraging Technology to Ease Client Pain Points

When speaking with clients about their pain points, keep in mind which issues may be easily fixed with the right technology. Just remember, the goal of these conversations is to help make your clients' lives easier – not just to upsell them on services.

For example, if clients are struggling to wrangle in employee spend, then the spend management controls and approvals available within Divvy, a BILL spend and expense management solution, might be a good fit. Or if you hear that clients are struggling with time management and are bogged down by manual processes, AI technologies could reduce the potential for error.

Another opportunity could come from working closely with clients to see if there's any room for optimizing their tech stacks with either supplementary technology or improved processes. The additional time and money saved are a compelling proof point for implementing new technologies in their daily workflow.

Additionally, see how your firm's technology partners can help out during this season. For instance, BILL provides a variety of options for firms – resources, templates, and lunch and learn options to make it easier on busy teams to harness the full potential of the platform.

Even if no opportunity develops, having these conversations may not be entirely fruitless. At the very least, you may find ways to streamline work ahead of the next year's tax season.

Setting Clients up for Success in Future Busy Seasons

Beyond an important touchpoint for clients, tax season also provides accountants with a valuable opportunity to stretch their advisory muscle to help ease client pain points and set up clients for success in future busy seasons. However, building strong relationships won't come from one virtual meeting. Rather, strong relationships are built through regular touch points throughout the year that demonstrate the value of your firm as a strategic advisor to your clients.

Accounting firm leaders can explore ways to train staff to listen for opportunities and cues that speak to client needs throughout the year. These valuable opportunities help to instill a collaborative approach to client relationships, while deepening ties across the firm.

It's hard to think of the future when your firm (and you personally!) are swamped with busy season tasks. However, carefully listening to clients during time sets your firm up for future successes while building strong client relationships. Just like how it takes more than one meeting to make a friend, it takes more than one meeting to build a strong client relationship.

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