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Joeseph Graziano • Aug. 11, 2023



The Green Thumb Approach in accounting allows your firm to *grow and thrive*. The approach is similar to gardening. If you're a gardener, you have a "green thumb" that allows you to plant seeds, water your plants, care for them, and watch them thrive.

Accountants can take this same approach to grow their firm through careful and strategic planning.

If you follow the right approach with your firm's clients, you can nurture your relationships

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strategies below can help you achieve this goal.

1. Foster a Client-Centric Culture

Your clients need you to grow and change with them. One study found that [27%](#) of clients want firms that are more familiar with their industry and business. A client-centric culture allows for this through:

- Identifying your clients' needs
- Understanding the needs of your clients
- Creating custom services for your different client segments

How can you get started?

Start engaging with your clients more. A major complaint in the accounting industry is that clients do not hear from their accountant often enough. If you fall into this category, it's difficult to truly know your clients' businesses and needs.

You need to balance healthy communication with:

- Creating multiple touchpoints
- Implementing a constant feedback loop
- Having face-to-face meetings every quarter or so

Communication is key when using the Green Thumb Approach. You want to make it easy for your clients to reach out to you and streamline your team's communications so that messages are never overlooked.

For example, you may:

- Offer a monthly call with clients to check up on them
- Have face-to-face meetings once a quarter or every six months

- Allow clients to communicate with you on a custom client portal

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- Nurturing outside of just your customers
- Sending leads to others in your network
- Staying in touch with prospects, even if it means reaching out on social media or picking up the phone to give them a call

As an accountant myself, it's always surprising how few accountants keep a pulse on their outstanding pipeline. Just because a prospect said that the time isn't right to work with you at one point doesn't mean the time won't ever be right.

Spending time nurturing your network will help you not only turn prospects into clients, but it'll also help you attract more referral sources.

With a strong network behind you, it's time to begin improving your core services.

3. Bolster Your Core Accounting Services

Improving efficiency and automating redundant tasks will free up valuable time that can be spent on attracting and retaining clients. Adopting new technology can also help reduce the risk of human error and streamline processes.

For example, you can simplify:

- Appointment scheduling by using a calendar scheduling tool like Calendly
- Document sharing by utilizing an online portal that allows clients to upload their documents.

These two processes alone can save your firm time and improve the client experience. Clients will have an easy way to schedule a meeting and share their documents conveniently, and your firm has an easy way to manage meetings and documents.

To further strengthen your core services, look to employee training. It's important to

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4. Find Ways to Innovate

If you want to grow your firm organically, find ways to innovate. Analyze your offerings and pinpoint areas where you can:

- Add additional value
- Solve client pain points
- Serve your clients in ways they aren't currently being served

Offering advisory services, such as financial planning services, is one way you can innovate and start becoming a one-stop shop for your clients. There's a good chance that your clients already need these services, and who better to provide them than their trusted accounting firm?

In fact, a survey from CPA.com found that **29% of clients** said they needed advisory and consulting services. And 68% of these surveyed clients said they wanted their CPA firms to provide strategic consulting services.

The demand is there, and you can meet it by incorporating these services into your offerings.

Advisory services are complementary to your accounting services, and financial planning can help clients plan for the future.

When adding these services, you can build an in-house team, or you can partner with a firm like FFP that can provide these services for you.

Final Thoughts

Taking the Green Thumb Approach to organic growth can help you achieve long-

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