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experience.

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*By Melissa Hertell, CPA.*

Did you know that client-centric firms are **60%** more profitable than non-client-centric competitors? If you want to build a firm that generates more profits, understands its clients better and builds loyalty simultaneously, you need to reprogram your firm.

How? I'm going to show you the steps I've taken to create a client-centric firm that

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- Clients are on job sites all day
- Clients wake up very early

Most firms are not willing to go the extra mile that I do with clients in the trades industry. I'll take phone calls at 6 AM and 9 PM because these are the only times these clients can reach out to me.

Dissecting your ideal client, their industry and the life they maintain will empower you to help them with:

- Service times that best meet the client's needs
- Tax solutions catered to the client's industry

You have the ability to go the extra mile with your clients, become client-centric and increase the odds of a client working with you long-term because you know their pain points. If you build your firm with this approach, your clients will likely pay you *more* because you offer a service that few firms do.

Don't know the client's needs? You can and should meet with them to learn their needs, what their day looks like, and how you can fit into the equation. If you have a meeting with your client to learn about them and the work they perform, you're already a step ahead of the competition.

Allow yourself time to understand your clients before moving on to your long-term communication.

## Create Communication Policies

Communication is the key to success in *every client relationship*. I truly believe that. If everyone is on the same communication page, it sets expectations from the start.

Firms that don't have policies in place for this will often *miss a beat* with their

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When clients harbor specific expectations and you assume they're being met—yet they aren't—it can lead to significant frustration and dissatisfaction. Most of your clients may know that you reply within 48 hours and not immediately, but new clients may believe a response in 12 hours is necessary.

Having a clear communication policy will set expectations, and you must follow your own policies.

Your firm may decide to have:

- Provide emergency contact info
- Have response times of 24 – 48 hours for calls and emails
- Ensure onboarding explains your communication policies

As we'll see shortly, your software and processes can make a world of difference in client communication. When you onboard clients, you can walk them through your communication policy and the forms of acceptable communication.

Educating your clients on the firm's policy will empower you to put your foot down when boundaries are not met and improve client satisfaction at the same time.

Again, the right software and processes can make onboarding and educating clients much easier.

## Implement the Right Software and Processes

Technology can help you build a client-centric culture. The right software and processes will improve the client experience and allow you to better meet their needs. At the same time, your firm can also streamline processes.

For example, I use a platform that allows me to not only track projects but also

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flexible. Remember that clients are the focus here, which means that you have to see things from their perspective and meet them where they're at.

For instance, I have a client who isn't well-versed in technology. To accommodate their needs, they send me their documents via email, and I subsequently upload them to our platform

If I tried to force the client to use the platform, I may lose their business. It's not something that works for them or interests them, so I meet them halfway.

If you want to take a similar approach, make sure that you have documented processes or procedures for handling these clients, and communicate those procedures to them. This way, all clients that fall into this category are treated the same way, and your work is consistent.

There are many software solutions for firms that make it easy for clients to upload documents and communicate with your firm. Compare your options and find a solution that will meet your client's and firm's needs. Don't forget to consider *client* training to ensure they know how to use these solutions properly.

## Create a Feedback Loop and Continually Improve

Building a client-centric firm means understanding what clients want and continually improving your processes to meet their needs.

How can you understand their needs? Create a client feedback loop, and take their comments *seriously*.

Set aside time to review client feedback regularly, and implement reasonable changes to improve your services and solve client problems.

# Conclusion

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Melissa Hertell, CPA is the owner of Blue Dove Consulting Group where they offer outsourced CFO and bookkeeping services. To learn more about her or the firm, please visit <https://www.bdcgllc.com/>.

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