

20 Things Clients Really Want from Their Accountant

(But May Not Always Tell You)



1.

Be upfront, clear, and honest about fees.

It may seem like a no-brainer, but this is a top consideration for clients. Be sure to explain your pricing structure and fees prior to starting on a project.

2.



Offer financing options.

Help clients understand how you can work with them on a payment plan or schedule for optimum new client acceptance.

3.



Provide weekend appointments.

Find out what hours work best for your clients and do the best you can to accommodate.

4.

Use client cancellations to your advantage.

Use an automated communication software to alert clients when you have a last-minute appointment available.

5.

Have good reviews.

Make sure to put effort into consistently generating positive reviews and ask happy clients to share their experience online too!

6.



Respond to reviews.

If a loyal client takes time to write a positive review, be sure to thank them for their kind words!

7.



Send appointment reminders.

Keep your no-show rate low and profitability high with personalized, timely client appointment reminders.

8.

Send eNewsletters with tips and recommendations.

Stay top-of-mind throughout the year while providing valuable articles and information.

9.

Provide incentives for referrals.

If someone sends you a referral, give them a small gift card to Starbucks™ as a way of thanking them for their support.

10.



Have friendly staff.

Going to the accountant can be a tedious experience for many, so the more personable, and friendly you and your staff can be, the better!

11.



Send follow-up emails.

Send a friendly follow-up email that recaps everything discussed in a meeting to avoid anything falling through the cracks.

12.

Have a secure firm portal.

Invest in a user-friendly, secure portal that helps clients easily share highly-sensitive materials with your firm while putting them at ease.

13.

Run on-time.

No one likes to wait. If you're running behind, call clients that are scheduled that day and let them know you're a bit late.

14.



Have a mobile-friendly website.

Most of your website traffic is from a mobile-device, so make sure the viewing experience is flawless with quick load times, thumb-friendly buttons, and easy-to-find contact information.

15.

Be confident.



And, speak from a place of authority. You're their accountant so your advice should be clear, easy-to-understand, and assertive yet approachable.

16.

Thoughtfully answer any questions.

You want to make sure they feel heard and understood at all times!

17.

Have a complete website.

Make sure your website has enough details on various services so clients can reference it to learn more.

18.



Ensure responsive customer service.

Make sure your office monitors all contact points to ensure no client falls through the cracks (e.g. social media, email, voicemail, etc.).

19.



Maintain up-to-date contact information.

A small miss of changing a phone number or updating an address on your website can cause a lot of confusion and frustration among clients. Plus, it's bad for your rankings on search results.

20.

Be authentic!

Clients are loyal when they feel their trusted accountant truly cares about them and their financial goals. The more you can continue to create great experiences – before, during, and after – the client's appointment, the greater their loyalty will be to your business.

Want more ideas on how to market your firm and attract new clients throughout the year?



Call CPA Site Solutions at (800) 896-4500 or visit www.CPASiteSolutions.com to learn more.