

Total Client Service: **Did You Deliver All of Your** **Services, Or Just the Audit?**

Alan W. Anderson, CPA

ACCOUNTability  Plus, LLC

DRIVING ACCOUNTING FIRM EXCELLENCE

High quality client service is essential to client satisfaction and retention. Virtually every size accounting firm I know has marketing materials promoting their excellent client service along with their high quality audit and tax services. Prospective clients are forced to sort through all of the similarities in marketing terminology on the firms they are considering.

At the same time, firms are being challenged by continued commoditization of historical services coupled with higher client expectations. Commoditization in the audit world is commonly referred to as the process clients use to reduce their audit firm selection decision to the lowest common denominator: price. In essence, clients view the audit as a commodity and want to pay the lowest possible price, but still expect superior client service. In this environment, client service doesn't typically *win* the client, but it does work to *keep* the client.

On the other hand, the audit firms become frustrated noting the special skills and professional training required for a CPA to perform quality work is extensive and all that effort is being viewed as a commodity. High quality is seen as a given in every firm, so what remains as a means of differentiation is the quality of your client service. Many firms will assign someone or set up a department to be responsible for client service as a means support a firm's client service programs and activities.

Consider the following question. In your firm, who is assigned the responsibility for client service? If your answer is anything but, "everyone in our firm has this responsibility," your firm is missing the boat. Client service is not a department, it's everyone's job.

CLIENT SERVICE AS A DIFFERENTIATOR

Every person in your firm is a link in the "chain of client service." Any weak link can cause the chain to break and result in an unsatisfied client. Client service is not achieved by completing a checklist; it requires a culture and a commitment to be the best at client service.

Weak links can easily be overlooked as they appear to be little "things." Over time, however, they can add up. Certain examples can include:

- Misspelling a client's name or misspelling in general

- Have the wrong year on a client assistance letter sent to the client
- Not remembering a client's name
- All phone calls go directly to your voice mail
- Staff taking personal phone calls on their cell while working at the client
- Financial statements containing a smudge a page

I am certain every firm can create their own list of little things; however, they all send a message that will differentiate you in the eyes of client. Unfortunately, it will be a negative differentiator rather than a positive one. Every touch point you and your firm have with your client should be seen as an opportunity to excel in client service. Over time, client service culture will evolve and become a means of positive differentiation.

THE "CLIENT EXPERIENCE" INFLUENCES CLIENT SERVICE

Audit staff are on the front line for client service, as they spend the most time with the client during the audit. A positive client experience with the staff during fieldwork is a crucial building block of client service. It is important to regularly remind your staff about how the client experience influences their views about the quality of your firm's client service.

Again it's the little things that can positively impact the client experience, such as:

- Being courteous
- Being on time
- Smile
- Having a positive attitude
- Acting professional
- Dressing professionally
- Being respectful of the client's time
- Keeping sensitive client documents or reports protected

The above items are not a program or a checklist, they are a mindset and an attitude. They do not cost the firm anything except for the time spent to discuss the importance of the client experience with you staff. The payback can be substantial, as the client is satisfied and generally results in longer client retention.

CLIENT SERVICE ELEMENTS

Most firms understand the importance of client retention; yet, quite often do not establish a culture of client service and put client retention at risk every day. As Nigel Sanders put it so succinctly:

“Every Client You Keep, is One Less that You Need to Find”

The following client service elements enhance client service and can increase the likelihood of client retention:

Be Accessible

Do you answer your phone or let it go to voicemail? Even when you are available? When your clients call, they are calling with the expectation of talking to you. Over time if your client cannot reach you when they call, they may start calling someone else: your competitor.

Respond Timely

When you are not available when your client does call, how long does it take you to return the call? Many firms establish a return call policy that requires everyone in the firm to return client calls within a designated time frame. Most firms that have such a policy also clearly communicate that policy to their clients to establish a clear expectation with the client. If you establish such a policy, make certain everyone in your firm complies with the policy.

Understand Your Clients Business

Your clients want you to take the time to understand their business. Clients a choice who performs their audit work. The “commodity” in the eyes of the client is the audit and the “value add” is the ability of the auditor to relate to their business. The better you understand the client business, the greater the likelihood of you keeping that client for a long time.

Plain English Please

Clients don't want you to talk with them in "standards speak." When the auditor talks the client in the jargon of the profession, they tune out and get confused. They want you to talk with them in plain English so they can understand the auditor.

Rules and Regulations Are Your Problem

Clients have enough rules and regulations to contend with and really don't care about all the rules the auditor has to follow. Clients are getting an audit because they are required to do so and would much rather you talk to them about their business and not about the new rules you are required to follow.

Understand All the Services you are Delivering to the Client

Your clients expect all your services to be of high quality and delivered on time or ahead of schedule. It is important the entire engagement team know all the services that need to be completed for each client. If you deliver the audit on time but are late in delivering that tax return, you failed in the eyes of most clients. In addition to knowing all the services that are to be delivered, the team should also know what the dates services are expected to be delivered.

Clients Vision for the Future

When was last time you talked to your client about their vision for the future? Most auditors are uncomfortable asking open-ended questions, especially in areas outside of accounting and auditing. However, most clients *are* interested in talking to someone about their businesses and its future. Conversations of this nature work toward building a relationship with the client and actually work toward you becoming their trusted advisor.

Say Thank You!

Let your client know you truly do appreciate their business. Let them know this by thanking them at least once a year.

IN SUMMARY

The best client relationship is one that is long term. Long term relationships need to be constantly cared for and nurtured. Providing total client service to your clients will promote long term client retention. In addition, total client service will move you out of the stereotype of being seen as just another provider of commodity services.