competence, in the information technology world, the certifications are ...

Randy Johnston • May. 13, 2019
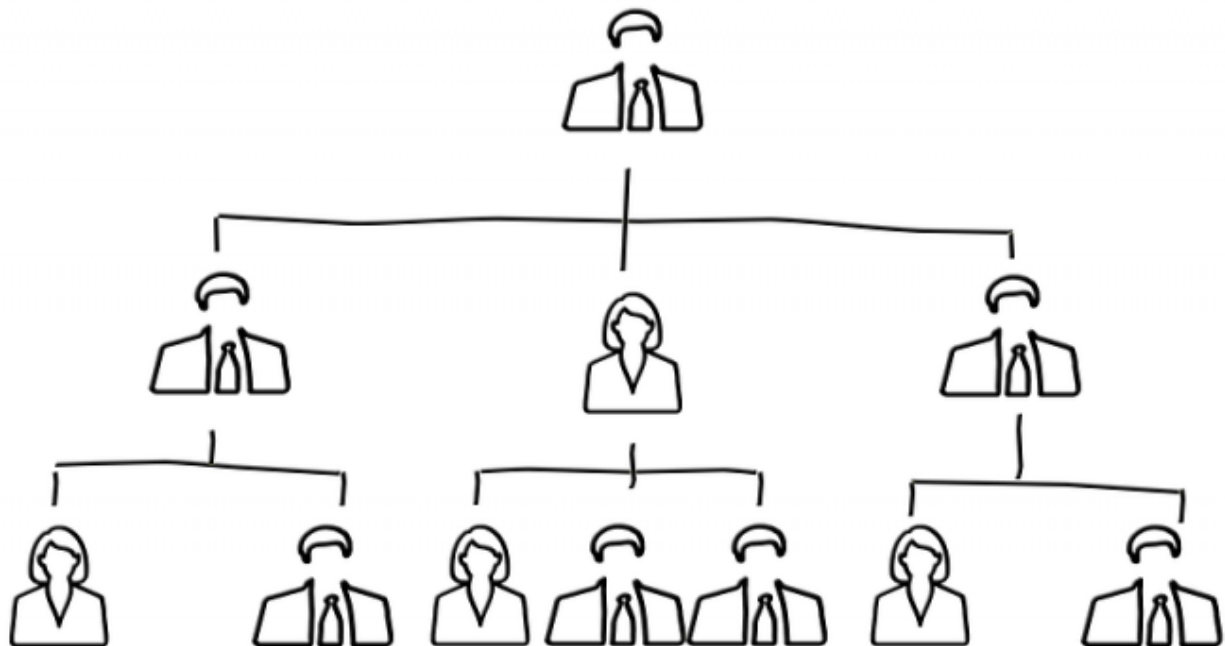
From the May 2019 Issue.

Some things never change about providing great client service. You must have the right people with the right attitude and the right skill set. This column is not about human resource issues, although we are fans of many of the HR certifications such as SHRM-CP or SHRM-CSP certifications, self-assessment tools such as Kolbe, talent management systems like Manage 2 Win, and learning ladders or matrices for IT or marketing such as those provided by Lynda.com.

While there are obvious advantages to having your [CPA license, a Series 7/65/66 RIA](#),

common sense, clever, innovative and practical. While it is always good to be around people that are excellent technicians whether in accounting or information technology, there is great value in vision and operations, too. How can we use technology to enable great client service? First, we should define what we want as our client service deliverable.

So, How Can I Help Clients Better With The Right People?

If you haven't thought about it in a while, client service levels and product quality in many industries has declined. While innovation in technology has provided an excellent price/performance ratio, the drive for recurring revenue and increased margins while doing less work can provide more or less value to the client. While automation can reduce the amount of human labor required, there are still certain activities that require time and thought to do well.

Good enough may be an acceptable solution for many situations, but excellent client service is rarely "good enough." Are tools like Google Sheets "good enough" for spreadsheet models compared to tools like Microsoft Excel? Is sending a calendar invitation through [Doodle](#), [Calendy](#), [Hubspot](#) or [other tools](#), better than Microsoft Outlook or Google Calendar? Are you managing meetings and conference rooms through Exchange/Outlook and not able to see what rooms are available or in use? Are you better off with [meeting room apps](#) such as [Teem, Robin, RoomWizard, Workscape, MeetingMinder, or AskCody](#)?

What are your expectations from excellent client service? And what should your clients' expectation of excellent service be? In today's on-demand, just in time world, how much margin for error does your business have? If you just completed what is arguably one of the worst tax seasons in recent memory due to the Tax Cuts and Jobs Act changes, how much time did you spend on strategically thinking about the best

outcome for a client versus taking the tactical approach of simply getting the return

My expectations for client service are simple:

- Feel valued as a client on every encounter
- Receive an excellent product or service
- Complete the activity in a time efficient manner
- Believe that the price charged was fair

While different clients have different expectations, consider expectation lists made by others: 5 new expectations you must meet now, The Top Five Tips For Managing Client Expectations, Customer Expectations: How to Meet (and Exceed) Expectations, Top 10 Tips for Exceeding Customer Expectations, 6 Tips to Managing Client Expectations, How to Deliver Great Customer Service to Accounting Client?, or the learning from Rainmaker's use of Clearly Rated in Service Measurement to Service Excellence: 3 Client Service Lessons for Accounting Firms in 2018.

The team at your firm needs to know how to provide excellent client service. It should be clear to them what the firm's expectation is and that you enable each person to provide excellent client service. Consider building your own list of excellent client service expectations, and then work toward exceeding all those expectations. Technology tools can make each client service interaction easier, more seamless and professional.

What type of client interaction points should you consider improving? Think about how you handle these items today: **email** including timeliness, signature and appearance, **phone calls** including auto attendant, live answer, voice mail, headset use and call quality, **video conferencing** including picture and sound quality, ease of connection and clarity, **portals** including security, ease of use and completeness, **web site** including ease of locating information, navigation and appearance, **mobile apps** including HTML5 enabled, native or single purpose apps, **meetings** including effectiveness, comfort and follow-up, **client deliverables** including graphics,

professional packaging (even electronically), and clarity, **billing and payment**

You tell me. Think about your favorite restaurants, web sites, stores, events or experiences. Why do you like them? Why do you go back? Is money a big object? How do you feel that you've been treated? How do you want your clients to feel like they have been treated? Does technology get in the way or is it a help? Consider the tablet ordering at an Applebee's, the kiosk ordering at a McDonalds, or the self-checkout at your local grocery store or home building store. Better or worse?

CPA firms value client relationships. The client relationships lead to long-term value to the client and to the firm. Profitability of the client increases with the services offered and the satisfaction level obtained. The value of the service you provide is enhanced by the client service you provide. And the client service is enhanced by the technology tools your people use and the attitude of the people involved. Is it time to tune up your client service?

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