



Anna Lake Consulting

# Client Experience Roadmap for Accountants

One of the ways you can stand out in a crowded market is through your client experience. Your client experience is how you make your current and prospective clients feel. Many accountants focus on their technical expertise or which accounting software they use but what's important to clients is what it's actually like to work with you and how you make them feel valued.

I've designed this guide to help you think through how you communicate what it's like to work with you at each stage of the typical client journey and to give you some pointers to help your client experience stand out.

BUSINESS  
AS  
USUAL

ENQUIRY

RESEARCH:  
LOOKING FOR  
AN ACCOUNTANT

APPOINTMENT

RE-APPOINTMENT/  
ENDING THE  
RELATIONSHIP





### **Research – looking for an accountant (either a new business or an existing business looking to change accountant)**

Does your website and social media content communicate about what it's like to work with you – both visually and verbally? Do you feature pictures of you interacting with your clients or just headshots of your team?

Is your content focussed on your technical proficiency and the number of staff and offices you have, or does it communicate types of clients you wish to work with (this is so important as it demonstrates integrity and can save people a lot of time), and how you work alongside those clients.

Do your testimonials give potential clients insight into how you make your clients feel valued and highlight the benefits of working with you?



### **Enquiry**

Is it clear how potential clients make an enquiry? How streamlined is your enquiry process? Utilising apps such as 'Calendly' can be a really effective way of allowing someone to book time directly with you. You're able to ask them information about their business as part of the appointment process which will enable you to have an effective discussion with them when the time comes – it shows your prospect you've done your research and increases your chance of conversion.

Clunky and time-consuming enquiry processes can put prospects off and makes them wonder about the efficiency of your other processes.



### **Appointment**

What happens when you're appointed by a new client? Many accountants provide new clients with a standard 'welcome pack' which introduces their team members and sets out the best way to get in touch with them with any queries. Instead, you should ask your new client about their communication preferences and seek to introduce them to the relevant members of your team via an online meeting or in person.

If you don't currently send a welcome pack, perhaps you should consider doing so, it's a great way to build rapport with new clients, as long as it's focussed on them and not you! Of course, it's helpful to include some practical information about how your practice works but try to personalise it based on your client's needs.



### **Business as usual**

This is the point at which some accountants lose touch with how their clients are feeling. Once you get into the day-to-day business of doing the payroll, bookkeeping, VAT, annual accounts etc, complacency can set in. The focus can shift to securing shiny new clients and not on valuing the ones you've already got.

'We send our clients an online survey' is not a good enough answer to the question 'How do you make your clients feel valued?' Some ways you can show your existing clients their business is valued:

- Introduce them to other clients or people in your network who you think it would be beneficial for them to meet
- Invest in in-depth interviews to find out how your clients are feeling – they're more likely to open up to a third party and it's likely you'll uncover advisory opportunities to help you grow the account
- Seek ways to promote your clients' products or services – quick and inexpensive acts such as sharing their posts on social media go a long way
- If your clients do give you feedback – via an online survey or through an interview, act on it! Committing to act on any feedback you receive demonstrates you value their opinion as well as their business.



### **Re-appointment/ending the relationship**

If you find yourself in a re-appointment situation (for example if your client has a new MD or FD), demonstrating the value you've added to your client is key. They will often ask for the views of their team so make sure you invest in a multi-level relationship with the relevant people in the client organisation. You also need to be brave and ask the difficult questions and face up to situations where their experience with you may have fallen short of expectations. It's better to ask the uncomfortable questions and iron out any niggles rather than lose a client altogether.

Sometimes it's time to say goodbye to a client. They may have grown and have new requirements which you may not be able to meet, they may have been acquired by another business or wound down as part of an exit strategy. Whatever the circumstance, it's important to part on good terms. Ask for a testimonial and/or for them to act as a referee for new clients.

It's also important to ask yourself whether you want to keep all of your current clients - it works both ways! If the client no longer fits your ideal client profile, or are difficult to deal with, it's best to be upfront about that. Give them plenty of notice and offer to help them find a new accountant – this level of integrity speaks volumes and, if handled correctly, will be a credit to your reputation in the market.

Buyers of professional services are placing increasing value on client experience – they see technical expertise as given and, in reality, they don't care how many offices you've got (or not)! They want to feel valued, listened to and understood. If think communication of your client experience needs some attention, or you haven't yet thought about your ideal client experience, please contact me to arrange a no-obligation chat: [anna@annalakeconsulting.com](mailto:anna@annalakeconsulting.com)



# Client Experience Roadmap for Accountants

Use the points above to map out your ideal client journey checkpoints

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