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As a CPA, you can create value for clients with little to no extra work in countless ways. Some items will require some effort. Start with the highest ROI items: most value created for the most clients for the least effort.

1. Before They Buy Experience:

-    Use your expertise to help them deepen their understanding of their problem
-    Illustrate that you understand their problem better than they do (in simple terms)
-    Normalize their problem (“Why would you understand Financials or know how to forecast cash? No one taught you.”)
-    Share examples of other clients’ success (“You’ve helped clients just like me achieve success? Fabulous!”)
-    Trust in your process/results to increase their belief in their own potential success
-    Put client at ease

2. Onboard Experience:

-    Make your onboarding process simple for the client
-    Make your onboarding process as short as possible for the client
-    Reduce their hassle factor as much as possible when gathering:
 - Bank account info, log-ins, TFAs
 - Name, address, soc, phone, email
 - Forms of all types
-    Lay out their steps
-    Remove redundant or duplicate steps
-    Set clear expectations and rough timelines
-    Solve client’s urgent problems as quickly as possible
-    Answer client’s questions as quickly as possible

- ● ● Set expectations/timeline for what is needed to be able to address their urgent problems (rather than leave them in the dark on your timeline)
- ● ● Create early “quick wins” whenever possible

3. Ongoing Experience:

- ● ● Make meeting times convenient for them
- ● ● Make meeting location (online / on-site) convenient for them
- ● ● Ensure meetings start on time and end on time (or early)
- ● ● Ensure meetings have a clear agenda provided by both sides
- ● ● Ensure meetings are valuable
- ● ● Use standing meetings to be more efficient *as needed*
- ● ● Avoid unnecessary meetings and meetings for the sake of it
- ● ● Ensure reports are always ready on time
- ● ● Ensure reports are worth their time to look at
- ● ● Limit information for the sake of information: reports are what they need, not “everything you could possibly give them”
- ● ● Paying you is simple or automated

4. Communication:

- ● ● Make it clear. (If you play email ping pong, it may not be.)
- ● ● Remove jargon they can't follow
- ● ● Type out TLAs – Three-letter acronyms they don't know, such as QBO, DD, etc
- ● ● Include clear instructions and next steps
- ● ● Clarify response time: 1 day, 5 days, 3 weeks, If ever
- ● ● If time to research is required, tell them when they can anticipate hearing back
- ● ● Decrease your time to research and find answer
- ● ● Make it easy to reach an appropriate person on staff
- ● ● Clarify which avenues are best (Email? Portal? Text? Landline?)

- ● ● Anticipate: provide them with valuable information or data before it occurs to them to ask, rather than leaving them to ask or find it themselves

5. Results:

- ● ● Increase speed of results
- ● ● Improve the results, even beyond their own goal
- ● ● Increase the predictability and consistency of results
- ● ● Improve the likelihood of achievement, success, and specific results

6. Access & Timing:

- ● ● Clarify typical response time: none, within 2 days, next day, same day
- ● ● Allow access between meetings: email, landline, cell
- ● ● Allow client to schedule impromptu or additional meetings
- ● ● Vary date of the month by which financials are delivered

7. Up a Level:

- ● ● Be proactive about any problem, challenge, or upset
- ● ● Reduce the effort required by the client anywhere in the engagement
- ● ● Reduce the sacrifice required by the client (If you want _Y_, you'll need to give up _X_. "You'll need to give up control of doing your own financials.")
- ● ● Reduce the number of times clients have important questions but don't ask them

8. Next Level:

- ● ● Tie finances to business strategy (rather than only deliver financials)
- ● ● Deliver insights and experiences from working with similar clients
- ● ● Share common characteristics of successful clients

9. Connect to outside experts on key topics :

- ● ● Pricing guidance and/or resources for pricing guidance

- ● ● Staff / HR challenges
- ● ● Workers Comp & Insurance challenges
- ● ● Retirement Set Up challenges: 401k, HSA, IRA, Conversions
- ● ● Will, Trust, Medical Directives
- ● ● Recommended podcasts & books
- ● ● Recommended Facebook / Slack Groups
- ● ● Tech vendors
- ● ● Security vendors
- ● ● Benchmarking

10. Sharing expertise:

- ● ● CEO Roundtable
- ● ● "Show me how you ____"
- ● ● 1:1 introductions

FINISH LINE!! 🎉
