



9 tips for being more responsive to clients

Experts tout the importance of being receptive, available, and approachable.

By Cheryl Meyer

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Developing strong relationships with clients is a key to attracting and retaining new business. That's one reason why it's vital for CPAs to be both available and responsive.

"One of the top reasons accountants lose clients is because they are not responsive enough," said Edward Mendlowitz, CPA, partner at WithumSmith+Brown in New Brunswick, N.J.

But being responsive isn't always easy. CPAs and their firms face daily pressures and have hectic schedules. Clients contact them via phone, email, and text. Multiple clients may want attention simultaneously. And clients may expect their CPAs to be on call day and night.

If communication is light or lacking, sometimes CPAs do not realize that clients are dissatisfied with their level of responsiveness.

How can CPAs and their firms ensure they are being sufficiently responsive to their clients? Leaders in the profession offer the following advice:

- **Return calls, emails, and texts in a timely manner to establish trust.** It's all too easy to push things off until the next day. Many firms have a 24-hour rule, stressing the importance of callbacks or returned emails or texts within that time frame. "I try to return every client phone call by the end of that day," Mendlowitz said. "Returning phone calls is an indication of availability. Clients want to know that you are there if they have a real serious problem. If a client calls you at an inconvenient time, ask them when you can call them back."
- **Establish a response policy.** Firm leaders should create a policy that explains how quickly clients must receive a response, and then communicate that policy to employees, said Hank Levy, CPA, founder of The Henry Levy Group in Oakland, Calif., and a partner at ELLO, an MGO member firm. Joseph Tarasco, CPA, founder and CEO of consulting firm Accountants Advisory Group in Cold Spring, N.Y., advises firms to drop everything if a client has a crisis. "With competition you have to respond," he said. "That's today's world—everyone is walking around with cellphones, and clients know this."
- **Choose to communicate in a way that suits your client.** Some clients prefer emails; others prefer

texts or phone calls. Some want to meet in person. So know how your clients want to communicate. "Respond back in a fashion that will retain that client and keep that client happy," Tarasco said. Also, reach out to clients occasionally just to say hello, as that can help build relationships as well.

- **Prioritize.** Make lists of clients you need to contact and/or respond to. Take advantage of different productivity tools, such as spreadsheets and apps, and keep revisiting and updating your lists, Levy said. Also, if at all possible, don't delegate client-related tasks that are priorities and time-sensitive. "If you do delegate, make sure you follow up. Do not assume that it will always get done," Tarasco said.
- **Use language your client will understand.** Your clients "are not tax accountants with advanced tax degrees," Tarasco noted. So avoid sending them jargon-filled emails and instead explain things to them in layman's terms.
- **If a client wants to meet, do it.** If a client requests a meeting, "do not make an appointment for two weeks out," Mendlowitz said. Instead, try to meet as soon as possible, even the next day if you have time. Doing so highlights your availability and responsiveness. Similarly, don't write a 10-page email if there is a lot to discuss. In addition to the necessary written documentation, you also should meet face-to-face for something that is important or complicated, Tarasco advised.
- **Be compassionate.** Clients should view you as a trusted adviser, and that means being a good listener. "If a client has pain, try to find out the pain and meet with the client to help them through it," Mendlowitz said. "Empathize with the client and feel what they are going through." Also, be sensitive to clients' changing needs.
- **Follow up.** Even if a client seems satisfied with your response to issues that arise, contact them again within a few days. Ask, "How are things going? Did it work out as planned? Did my advice help? Did anything else get uncovered?" Tarasco said. "Follow-up is key."
- **Keep your client roster manageable.** While it's great to add more clients to your roster, having too many can make it difficult to serve all of them in a timely manner and keep them happy, so don't take on too much. "If you are not responsive to clients, you give them a reason to leave you, look outside, and complain," said Richard Lash, CPA, managing partner at Walthall CPAs in Cleveland.

Most partners in public accounting firms achieved their success because they were responsive to their clients. "That's the No. 1 commandment," Tarasco said. "So if you are breaking that No. 1 commandment, you can't stay in business."

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