

Take Advantage of Planning Season – Connect with Your Clients

If you're committed to deepening client relationships and delivering exceptional client service, it is critical to proactively meet with clients outside of your regular engagement periods to further your relationships, identify any potential service issues, and uncover new opportunities to add value. You may be nodding your head in agreement as you read this. However, when client surveys are conducted, clients repeatedly indicate that they wish their CPA would contact them "out of cycle" and "for no reason." This means that you can likely do more than you are today.

Client retention is a top concern raised by practitioners in a recent AICPA PCPS CPA Firm Top Issues survey, and it's something each of us aspires to ensure. Yet few of us are disciplined enough to proactively outreach to our clients because this type of behavior falls in what Stephen R. Covey defined in his book, [The Seven Habits of Highly Effective People](#), as Quadrant II tasks – those that are important but not urgent. Unless we owe our clients something immediately or they have a problem or complaint, our tendency is to put off any outreach and let it fall to the bottom of our list week after week. **We also may make up that "no news is good news." If we don't hear from our clients, then everything must be okay.** The opposite may very well be the case, though, as Ken Blanchard points out in his book, [Raving Fans](#), and the silence should be worrisome to us.

So, break the silence. Uncover ways you can increase your value to your clients and deepen your relationships with them. Simply commit to reach out to one client a week (or be bold by calling one and having lunch with a second!). **When our CPA firm clients have done this, they have been surprised by how thrilled – and surprised – their clients are to have their CPA calling them or asking them to have lunch just to check in!**

Fall and early winter are prime selling seasons, too, so while you're in the midst of the planning season, **consider asking each client owner in your firm to set a goal to meet with a certain number of clients each week to find new opportunities to help them.**

When you meet with your clients, ask questions that demonstrate your interest in them and build your relationships, including:

- How are things going in your business (or your life) these days?
- What changes are there in your team (or your life)?
- What concerns you most today?
- What critical decisions are you facing?
- What opportunities are you contemplating?
- What plans do you have to capitalize on them?
- How are we doing for you?
- What can we improve?
- How can we be of more help to you?
- Would you be willing to act as a reference for us?

Discuss the results of your client meetings during your regular sales pipeline meetings, being sure to add any new service opportunities you identify to your pipeline. Or, schedule time for all of your client service owners to share successes, troubleshoot any client service issues that may be raised, and plan for the follow up that you committed to your clients.

When you take the time to check in with your clients, you'll find new service opportunities to pursue and keep your firm top-of-mind with your clients when your competitors proactively reach out to them (which they will do!). Schedule your client check-in meetings starting today to deepen your relationships and uncover ways to increase your value to them.

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