



# The 3 Step Guide to Wowing Your Accounting Clients



# Introduction

Rapid changes in the accounting industry mean many traditional roles are now in jeopardy, while others are surging.

Estimated growth in the coming years, by industry:<sup>1</sup>



COMPLIANCE SERVICES

0-3%



ADVISORY AND CONSULTING

20%



WEALTH MANAGEMENT

200%

Now, more than ever, it's vital to create value, trust and expertise in your business relationships. You must become a true partner to your clients — someone who can always provide them with the advice they need, when they need it.

Throughout 20+ years of serving accountants and other professionals with products like BillQuick and CORE, BQE has learned to cultivate spectacular client relationships.

Follow these **three recommendations** to wow your clients in no time.

<sup>1</sup>Accounting Today

STEP

1

## Become a Knowledge Center

To be a true partner for your clients, you need the expertise to guide them. Recent tax law changes have bred uncertainty. What's more, entire industries are being irrevocably disrupted, while new business management technology is constantly being rolled out. To deliver real value to your clients, stay up-to-date with these changes and educate yourself.

Also keep in mind that team building is crucial. Ensure that you make the right hiring choices by identifying your current team's strengths and weaknesses. [Project accounting](#) is a fantastic way to analyze this.

Additionally, if you're part of a smaller practice, develop a network of trusted referral partners. You'll impress your clients by always being able to point them in the right direction AND you'll gain more business from your peers.



### TAKE ACTION

- Stay educated through webinars, events, podcasts and more
- Build your team strategically by identifying the skills you need
- Maintain a strong community of referral partners

## STEP

## 2

## Move to the Cloud *(and bring your clients along!)*

How many versions of QuickBooks are you running on your computer to accommodate your clients needs? How often have you been away from the office and needed access to critical information that's only on your desktop? These inconveniences cost time and money. They also prevent you from devoting more resources to your clients.



Migrating to a robust, fully functional cloud-based platform — and helping your clients transition as well — will cut costs, increase productivity and enhance data security. You'll be on the same page (and version) as your clients at all times, and have instant access to their information, regardless of your location.

On top of that, your data will always be secure and backed-up, plus you'll see improvements in the health of both your own practice and your clients' companies. Businesses that invest in cloud and mobility see up to **53% faster revenue growth** than those that don't. Additionally, 94% of companies report experiencing security improvements after switching to the cloud.<sup>2</sup>

### THE BENEFITS

- Be on the same page as your clients without the extra effort
- Instantly access their information from anywhere via the Internet and mobile apps
- Never worry about data backups or security breaches by moving to a cloud-based platform

<sup>2</sup>Salesforce

STEP

3

## Upgrade Your Communications

When business clients are evaluating a CPA firm, they look for responsive and accessible staff. While many practices have a 24-hour response policy, not as many are able to instantly provide clients with the information they're asking for.

This is why having access to real-time information at a moment's notice can be a gamechanger for your firm. Whatever software or SaaS platform you use should show and track KPIs, as well as automatically send reports to your clients on a regular basis.

This increases your availability and communication with clients, which fosters trust and loyalty for years to come.



### BETTER SERVICE

- Quickly find the right data and shorten response times with intuitive and robust analytics software
- Give clients the information they need before they even ask for it by scheduling reports
- Make a point of always staying connected through mobile apps

# Conclusion

94% of business clients and 81% of individual clients agree that their CPA firm is a valued advisor to them.<sup>3</sup> To meet — and exceed — these expectations, you must be committed to being knowledgeable, efficient, and accessible.

As we've recently seen, change happens so quickly that you can't always plan in advance. What you can do, however, is have a forward-thinking mindset. Without a willingness to adapt, it won't be long before your knowledge is outdated, your methods are inefficient, and your communication is lacking.

Start embracing change today so you are ready — and capable — of adapting to the future!

Are you ready to **wow** your clients? BQE can help.

BQE CORE is the culmination of years of hard work—software that streamlines essential processes, resulting in operational efficiencies and intelligent business insights. You can implement CORE quickly with no additional resources, access it from anywhere, and empower yourself and your clients with valuable business information.

With CORE, managing your entire firm can be done easily and profitably using just one platform.

TO LEARN MORE, CALL (866) 945-1595, OR VISIT:

[BQE.COM/CORE](https://BQE.COM/CORE)

<sup>3</sup>CPA Trendlines and CCH