CHECKLIST

Setting Expectations at Every Stage of the Client Journey

The key to building strong, productive, and profitable client relationships

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Why is it important to set client expectations?

Managing expectations is one of the most effective ways to provide an amazing client experience at your accounting or bookkeeping practice. As with any service business, expectation setting must go both ways. The client must understand what’s expected of them in order for you to complete your work. In turn, as an accountant or bookkeeper, you must set expectations to demonstrate your value.

Setting expectations is even more important for firms who are leveraging cloud accounting technology. Alongside the many benefits that come with operating on the cloud are a few challenges. For example, firms are now able to increase flexibility and improve communication (i.e., with tools such as Slack). As a result, client expectations have generally evolved to expect faster and more proactive service. Without adequate expectation setting, questions may arise regarding response time and availability.

Moreover, the consequences of misalignment or not meeting your clients’ expectations are greater. It’s easier than ever for clients to switch to another firm that provides similar services. As such, it’s important to prioritize expectation setting, as well as ensure you’re setting the right expectations at the right time.

Setting client expectations will enable you to:

Increase productivity: By clearly outlining the expected timelines and deliverables for a client’s particular services, you’ll be able to better allocate resources, complete tasks faster, create more opportunities for upsell, and plan for the future.

Mitigate risk: Legally binding engagement letters and/or contracts help to mitigate risk by documenting service expectations. These expectations are the first step to eliminating scope creep. Your clients will have defined parameters for the services they’ve engaged you for, and as a result, will expect a conversation regarding fee changes when it arises.

Reduce churn: Setting expectations upfront leaves little room for unwelcome surprises or negative outcomes. As a result, you’ll have happier, more engaged clients who are more likely to work with your firm for a long period of time.

Demonstrate value: You’re more than simply “an accountant” or “the bookkeeper” – you’re a valuable business partner! Understanding your clients’ needs and setting expectations that cater to these will help them understand where you will drive value in their business. For instance, telling them how the insights provided in their monthly financial report can impact their business will motivate them to do their part to help you provide it in a timely manner.

Improve relationships: When your clients have a better understanding of the value you contribute and what they need to do to help you provide it, it increases the productivity of your relationship. With the right expectations in place on both sides, you’ll be able to benefit more from each other and reach your business goals!

Managing expectations is one of the most effective ways to provide an amazing client experience at your accounting or bookkeeping practice. As with any service business, expectation setting must go both ways. The client must understand what’s expected of them in order for you to complete your work. In turn, as an accountant or bookkeeper, you must set expectations to demonstrate your value.

Setting the right expectations at the right time will enable your firm to build strong, productive, and prosperous relationships with your clients. However, setting and managing client expectations is often easier said than done — a lot can slip through the cracks. In this guide, we’ll provide considerations for proactively setting expectations at every stage of the client’s journey.
Best practices for setting expectations

When it comes to setting expectations with your clients, two common misconceptions often surface. The first is that expectations do not need to be set proactively – they are established organically as you work together. The second – and possibly more problematic – is that expectations are primarily set during the onboarding phase of the client’s journey.

The reality is that expectations should be set proactively. Best-in-class firms do so by documenting their processes and using checklists to ensure that they’re always on the same page with their client. Moreover, they’re aware that their clients’ expectations will change depending on where they are in their journey with your firm. (We’ll break down what to consider when expectation setting at each stage of the client’s journey in the next section of this document.)

Expectations should:

- **Reflect the client’s needs**
  Regardless of the services you provide and/or the terms of the engagement, your expectations must always be aligned with the clients’ needs. Even if it’s an expectation that must be set on the client’s end, position it in terms of what your firm is helping them to achieve (i.e., “In order to keep up with your bank reconciliations, which are important for understanding your business’s cash flow, you must send us your receipts on a weekly basis.”).

- **Be clear & concise**
  The leadership maxim that “ambiguity breeds mediocrity” can also apply to expectation setting with clients. To borrow an example from business strategist and author John Spence, let’s say a client emails you with a question and your response is: “We’ll get back to you right away.” Having unclear expectations around the meaning of “right away” might cause unnecessary tension. For the client, this might mean you respond in 20 minutes or less. However, you respond within two hours, and feel that you’ve served the client well because this is 30 minutes faster than your usual response rate. Be realistic when setting these types of expectations with clients, and be very clear when communicating them to your client.

- **Be set early & often**
  In a world dominated by automation, it’s easy to want to take a “set it and forget it” approach when it comes to setting client expectations. While many tools will enable practices to make expectation setting easier (i.e., via automated notifications, etc.), it’s important to understand that expectation setting is a continuous practice, and therefore you must set expectations on an ongoing basis. Nothing should come as a surprise to you or your client. In order to help you accomplish this, you must have a grasp on your client’s evolving needs throughout the client journey.
Understanding your client’s journey

Client needs — and therefore, expectations — evolve as they make their way through their journey as a customer of your firm. But what exactly does that journey look like?

The B2B (business-to-business) customer journey can be represented in a number of ways and broken down into various stages, depending on your business model and the types of services you offer.

For accounting and bookkeeping firms who provide monthly services, the journey typically happens in the stages outlined to the right.

In the following process guidelines, we’ll provide tips, best practices, and considerations for expectation setting at each stage of the client’s journey.

**ACQUISITION**

Acquisition is the process of attracting new business. For your client, the acquisition stage is where the buying journey happens, usually in the following order: awareness, consideration, decision-making, and finally, becoming a client of your firm.

**ONBOARDING**

Once your client agrees to do business with your firm, they should pass into the onboarding phase of their journey. Onboarding is the process of familiarizing a new client with your firm’s services. It’s typically recommended that onboarding be completed within the first 90 days from when your client signs on with your firm (as it’s believed that they’ll be less likely to churn within this timeframe). However, some firms will be able to complete the onboarding process much faster.

**MONTHLY SERVICES**

This stage of the client’s journey is ongoing (until the terms of the engagement end for any reason). This is typically when the “real” work happens — i.e., where you fulfill the terms of your contract, continue to build your relationship with your client, and help them reach their business goals!

**RETENTION, LOYALTY & EXPANSION**

As a forward-thinking firm, you’ll inevitably change your processes and services as new technology becomes available. Moreover, if you’re able to build a prosperous relationship with your client, ideally they’ll want to expand their services with your firm as they reach their business goals. This phase of the client’s journey will happen in conjunction with their ongoing monthly services, but has a different set of considerations when it comes to effectively setting expectations.
DEFINING THE EXPECTATIONS AT EVERY STAGE OF THE CLIENT JOURNEY

**Acquisition**

Expectation setting starts long before a client signs a contract with your firm. One of the most important steps you can take to set expectations is to determine your ideal client, define your services, align your marketing to these services, and clearly document your deliverables in writing. As such, it’s critical to nail down your firm’s positioning and your proposal process so expectations are set from the get-go.

**DEFINE & ATTRACT YOUR IDEAL CLIENT**

When determining your ideal client, consider the industry they serve, the type of product(s)/service(s) they offer, their projected business growth, the level of support they require, their attitude, and so on. Defining your ideal client will help you create better marketing messaging and leverage more relevant marketing channels. In turn, you will attract the types of businesses that will understand how your firm works, and will work within your expectations. If you’re still getting your firm off the ground, it can be tempting to take on any business that expresses interest, regardless of fit; however, clients who are a poor fit will ultimately require more hours and more resources (and likely cause a few more headaches). Working with clients who meet your requirements will make it much easier to set expectations that are mutually beneficial to both your firm and your client.

**ACTION ITEMS**

- **DEFINE YOUR IDEAL CLIENT**: Determine the types of businesses you want to work with and develop a framework that will help you to quickly determine whether or not a potential client is the right fit. Jennie Moore uses the acronym “DRAGON” to outline the characteristics of her ideal clients – in order to work with her, they must be Delightful, Respectful, Adaptable, Growth-Minded, Online, and fit her firm’s Niche.

  **Recommended resource:**
  - How to Pick the Right Clients to Grow Your Firm by Hubdoc

- **EVALUATE PROSPECTS & DETERMINE THEIR GOALS**: Apply your framework and evaluate whether or not a client is a good fit during the sales process. If a prospective client expresses interest in working with you, have them fill out a questionnaire via Google Forms or Typeform that will surface any potential issues that could impact your working relationship in the future (i.e., Have you worked with an advisor before? What did you like/dislike about their service? What are your business goals?). If they don’t appear to meet your requirements or their goals could potentially fall out of scope, reach out to your network to refer their business to a firm that can better meet their needs.

  **Recommended resource:**
  - New Client Questionnaire for Accounting/Bookkeeping Services by Quick Bookkeeping

- **ALIGN MARKETING MESSAGING & MATERIALS**: Now that you know the types of clients you wish to attract and how to evaluate if they’ll be a good fit, you can tailor your messaging and your marketing strategy to effectively reach this audience. Focusing on messaging is critical for setting expectations because it will both attract and deter prospective clients by enabling them to understand what your firm is all about right away. Getting your messaging right is especially important on your firm’s website — do you want to portray that you’re conservative and traditional, or that you’re edgy and hip? Similarly, it will help you choose the right marketing channels — for instance, if you determine that your ideal clients are in the food and beverage industry, consider advertising in an online food and beverage forum, or attending an industry trade show.

  **Recommended resources:**
  - Marketing for Accountants: The Essential Checklist by Hubdoc
  - 61 Ways to Get More Clients for Your Business by Practice Ignition

**ACQUISITION**

01 Define & attract your ideal client
02 Document service offerings & support packages
03 Use effective engagement letters

**ONBOARDING**

MONTHLY SERVICES

RETENTION, LOYALTY & EXPANSION
DOCUMENT SERVICE OFFERINGS & SUPPORT PACKAGES

Before you start to acquire clients, it’s critical to define your services offerings and your support packages.

Documenting what you deliver (regarding both service and support) will not only make it easier to set expectations regarding your deliverables to clients, but will also help you deliver them (and control costs). If you’re leveraging a fixed fee pricing model (or, considering switching to this type of model in the near future), documenting your services is required for successful operations.

ACTION ITEMS

☐ DOCUMENT YOUR SERVICES: Write down what you do (e.g., bank reconciliations, bill pay, balance sheets, financial reports, etc.), how you do it (your required apps/standardized tech stack), when you do it (the frequency at which each service is performed), and where you do it (onsite or virtually?). Be very specific — accompany each service with a procedure guide and a checklist.

Recommended resources:
• Best Practices: Writing Service Descriptions by Practice Ignition
• Profitable Value Pricing by Aero Workflow

☐ DETERMINE YOUR SUPPORT STRUCTURE & PACKAGES: When it comes to client support, it can be difficult to control scope creep. Along with defining your services, document your support procedures in detail. For each support package, ensure your clients understand how they can contact you (i.e., via a dedicated support email), how frequently they can contact you, your availability, and your response time (e.g., they can expect a response within 24 hours).

Recommended resource:
• Preventing Scope Creep: Managing Client Support by Aero Workflow

☐ TRAIN YOUR STAFF: Regardless of their role, be sure to onboard staff so they’re familiar with the level of service and support provided for each of your packages. Make sure the procedure guides and checklists that detail your services are easy to find and reference, and that any changes are clearly communicated to your staff. Workflow tools like Aero Workflow will automate this so that staff know what to do, when to do it, and how to do it. If your team has a clear picture of what services the firm provides to each client, they can easily identify client requests that are out of scope. Make sure your staff recognizes that an out-of-scope request is an excellent opportunity to upsell!

Recommended resource:
• Hiring & Coaching Strategies from LiveCA by Hubdoc

ACQUISITION

01 Define & attract your ideal client
02 Document service offerings & support packages
03 Use effective engagement letters

ONBOARDING

MONTHLY SERVICES

RETENTION, LOYALTY & EXPANSION
SETTING EXPECTATIONS: ACQUISITION

USE EFFECTIVE ENGAGEMENT LETTERS

You’ve documented your service and support packages. You’ve defined your ideal client, and a few who fit the framework have come knocking at your door! The final stage of acquisition is your sales/proposal process. The best way to effectively define expectations during this stage of the client’s journey is by leveraging engagement letters.

Even if you discussed your client’s support package options and the specific services you’ll be providing during your sales conversations, your engagement letter will legally define and enforce your terms of service with a particular client. It will also serve as a point of reference for ensuring that the original terms of the engagement are continuing to be met (and not over- or under-delivered). As a result, you’ll mitigate risk, reduce scope creep, and demonstrate a high-degree of professionalism from the get-go.

ACTION ITEMS

CREATE AN ENGAGEMENT LETTER TEMPLATE:
Your engagement letter should include:

☐ Identification: Specify who will be receiving your services.

☐ Scope of services: This is the most important part of your engagement letter. Similar to when you defined and documented your services, include the who, what, when, and where as it applies to each service. Be specific.

☐ Change of service procedure: This specifies what happens when the scope of work needs to change, whether client-initiated (i.e., they ask for new services) or practice-initiated (i.e., you’ve identified scope creep or they’ve reached their limits on the included services). Clearly articulate how you will communicate the scope change to the client and how they will receive a change request document with new fees outlined before any new work will commence.

☐ Period of engagement: Indicate when the engagement will begin and end.

☐ Fee structure: Include the date(s) upon which the client will be billed, as well as the frequency.

☐ Responsibilities: Outline what’s expected of the client in order for you to complete your work.

☐ Professional standards: Indicate the standards that govern the engagement according to your geographic region.

☐ Confirmation of terms: Your client’s signature represents that they’ve read and understand the terms of the engagement.

Recommended resource:
• Engagement Letters: Why They’re Important and What to Include by Practice Ignition

WORK WITH AN ATTORNEY:
Have an attorney review your engagement letter(s). Apply any legal advice to ensure they’re legally binding.

AUTOMATE THE ENGAGEMENT PROCESS:
Your engagement letter must include a great level of detail; however, that doesn’t mean that the process of putting it together needs to be manual or time-consuming. Use a tool like Practice Ignition to automate this process and get your client ready for onboarding faster!

ACQUISITION
01 Define & attract your ideal client
02 Document service offerings & support packages
03 Use effective engagement letters

ONBOARDING
MONTHLY SERVICES
RETENTION, LOYALTY & EXPANSION
**Onboarding**

Onboarding is a notoriously challenging process. Even if you’re working with clients who are the ideal fit for your firm, they can often feel overwhelmed, nervous, or stressed about putting so much trust and financial data in your hands so early on in your relationship. Moreover, since onboarding is dominated by administrative tasks, it can be frustrating (for both you and your client) to ensure you have the information you need to get them up and running.

Onboarding is the stage of your client’s journey that involves the most active expectation setting, especially with regard to how your firm handles communication, support, workflow, and technology. To make onboarding as seamless as possible, standardize your onboarding process, level-set every step of the way, and get insight into your client’s goals so they’re excited to kickoff their working relationship with you.

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**STANDARDIZE YOUR ONBOARDING PROCESS**

Standardizing your onboarding process is critical for several reasons. As a highly repetitive process, it will help to increase the overall efficiency at your practice and enable a structure from which you can measure your firm’s performance. Kicking off your relationship with a seamless, clearly laid out onboarding plan will help your client better understand what’s expected of them from the get-go.

**ACTION ITEMS**

- **STANDARDIZE & DOCUMENT YOUR ONBOARDING PROCESS:** The onboarding process can typically be completed in the following six steps. (Regardless of how your firm handles onboarding, be sure to help clients understand exactly what’s needed from them at each stage, and what you’ll provide at each stage.)
  - **01— Receive contract & send welcome email:** Your welcome letter should clearly indicate your client’s main point of contact during onboarding (e.g., an onboarding specialist), as well as outline their immediate next steps.
  - **02— Gather client information:** Send your client a questionnaire or form that they can use to submit all required information at once – everything from incorporation documents to their business goals (this can be included in your welcome letter).
  - **03— Set up project & apps:** Using the information received from your client, set up as many of their accounting apps as possible. For some apps, this might require you to set expectations regarding the client’s involvement with the app. With Hubdoc, for instance, many advisors will book a meeting to discuss the client’s role in maintaining automated connections and uploading paper documents.
  - **04— Client kickoff meeting:** Use this meeting to cover administrative tasks and train your client about your workflow and technology. This is also where you should verbally reconfirm your change of service process (which they’ve agreed to in their engagement letter). Reconfirming the change of service process enables your client to expect a fee change and an updated engagement letter when a change occurs.
  - **05— Send a welcome package:** In your welcome package, include a “cheat sheet” about your firm that includes contact information, hours/availability, and any other necessary information that will help set expectations about your firm.
  - **06— Transition to the bookkeeping team:** Once all of the above is complete, they should be set and ready for handoff to your bookkeeping team!

**Recommended resource:**
- Bookkeeping Client Onboarding Checklist by Aero Workflow, Hubdoc, and Practice Ignition
LEVEL-SET AT EVERY STAGE

Onboarding can easily be dominated by “back and forth” client communication, and/or looping in unnecessary parties for the sake of gathering information (which can easily cause a risky “too many cooks in the kitchen” situation). In order to avoid frustrating situations like these, there are a few areas where you should always set expectations to ensure onboarding goes as smoothly as possible.

ACTION ITEMS

☐ During onboarding, create mutual understanding in the following areas (as they apply during onboarding and beyond — refer to your engagement letter, where applicable):

☐ COMMUNICATION & SUPPORT:
  • Who is the client’s main point of contact at the firm?
  • Who is the firm’s main point of contact at the client’s business?
  • What is the dedicated tool/method for communication?
  • What is your firm’s availability and response time?
  • How frequently will you contact the client?
  • What’s the protocol in urgent or emergency situations?

☐ WORKFLOW & TECHNOLOGY:
  • What technology/tools/apps will your firm be using with this client?
  • Which of these tools are client-facing?
  • Who has access to the client’s account for a particular tool?
  • Who should the client contact for support regarding a particular tool?

☐ DELIVERABLES & TERMS OF ENGAGEMENT:
  • What will be delivered and when?
  • What are the client’s responsibilities in order to deliver on time?
  • What are the consequences of deliverable deadlines being missed?
  • How often will you review the terms of engagement (i.e., the engagement letter)?
  • If there are changes to the terms of engagement, what is the specific process to confirm a change of scope?

MAKE AN ACTION PLAN

Onboarding can easily be dominated by the accountant or bookkeeper, who needs information from the client in order to set up all their accounts, add them to their system, and so on. However, expectation setting goes both ways — onboarding is also a critical period in which the client shares what they expect from you, and what they hope your services will help them achieve. Understanding their goals and discussing your services in terms of their goals will help you to better position your value.

ACTION ITEMS

☐ CONFIRM AND ELABORATE ON YOUR CLIENTS’ GOALS: Revisit the goals/outcomes identified in the acquisition process. Discuss these with your client in-depth and build a plan that will help you to accomplish these.

☐ DETERMINE AN ACTION PLAN & FRAMEWORK FOR MEASURING GOALS: How will you measure your progress? What are the objectives and key results that you’re working toward? Having a documented plan that you can refer back to will enable you to provide more contextual advice.
CONTINUE TO LEVEL-SET

Onboarding involves a lot of active expectation setting, whereas diving into your recurring monthly service work becomes more about managing these expectations. If you anticipate that a particular activity or project will not move forward as expected, how will you communicate about it? If a client is not meeting your expectations (e.g., they’re missing deadlines for sending in documents, and/or you’re constantly chasing them for information), how will you course-correct and help them maintain good habits?

ACTION ITEMS

☐ Continue to check in and build mutual understanding in the following areas, as well as ensure the engagement terms are continuing to be met:

☐ COMMUNICATION & SUPPORT:
  - Is the client’s contact information up-to-date?
  - Has your firm’s availability or response time changed?
  - Has the frequency of client contact increased or decreased?

☐ WORKFLOW & TECHNOLOGY:
  - Should access be added/revoked for any tools?
  - Are all usernames and passwords up-to-date?
  - Is the client submitting all necessary information/documentation on time, using the method outlined during onboarding?
  - Have your tools added any new features?
  - Do any new features eliminate workarounds?
  - Is your workflow and procedure documentation up-to-date — i.e., are the accompanying screenshots and documented steps still accurate? (Note: Ensure you have a process in place for maintaining your procedures.)

☐ DELIVERABLES & TERMS OF ENGAGEMENT:
  - Are you regularly reviewing the terms of engagement (outlined in your engagement letter) to ensure the agreement still stands? (Note: Review these in detail — for example, if the engagement was signed to provide payroll for three employees and now they have nine, the terms will need to be updated accordingly.)
  - If the terms need to be updated, have you followed your change of service procedure, agreed upon new fees, and updated payment and collection? (Note: this can be automated using Practice Ignition.)

KEEP YOUR CLIENTS IN THE LOOP

Introducing additional ways to communicate with your clients is a great way to keep them engaged, as well as send general reminders, updates, or changes that will help manage expectations. One of the best ways to keep your clients in the loop is by sending out a regular newsletter or sending a video update in which you provide insights about your firm (e.g., upcoming holiday hours), your team (e.g., promotions and upcoming out-of-office notices), and the industry in which you specialize (e.g., how are you staying compliant with industry standards?).

ACTION ITEMS

☐ INTRODUCE A NEWSLETTER: Add a regular communication cadence with your entire database (e.g., via a weekly, monthly, or quarterly newsletter). Communicate to your clients the frequency at which they will receive the newsletter, as well as the information the newsletter will include. If you see success with this tactic, you might consider investing in marketing automation or email software that will help you better manage how you send your newsletter and who you send it to.

Recommended resources:
  - Creating an Accounting Newsletter That Works by Xero
  - 5 Steps to an Email Newsletter Your Customers Will Love by Duct Tape Marketing
  - The 25 Best Email Marketing and Newsletter Apps by Zapier
BE REALISTIC ABOUT CHANGE

The accounting app ecosystem is quickly growing. Savvy accountants and bookkeepers take measures to stay on top of new solutions and ensure their firm is always using the best available technology in the market. In order to successfully introduce new technology, firms must set expectations with clients surrounding any process changes.

ACTION ITEMS

[ ] COMMUNICATE VALUE: Even if you’ve been rigorous about working with clients who are the right fit for your firm (and, therefore, are comfortable with your firm’s pace of change and open to adopting new technology), it’s important to communicate to your clients that you’re always trying to make their experience better, which will inevitably result in some process changes.

[ ] REVISIT YOUR SUPPORT STRUCTURE: Has the required support scope increased since you’ve implemented a change (or do you expect it will)? Ensure your support structure and packages can still adequately support your clients’ needs, especially as you make changes to your workflow and technology. Similarly, if there are recurring support issues with a particular client, meet with them to ensure they understand their role in a particular workflow or when working with a particular app.

[ ] HAVE A PLAN: When implementing a process change or introducing a new tool to existing clients, always have a clear plan as to how you will roll this out (and communicate this to your clients). It can be as simple as the following three-step process:

  01 — Set up the client’s account: Set up as much of the client’s account as you can on your end.

  02 — Conduct client training: Give specific instructions when detailing how the client will use the tool and the part they play in your new/revised workflow.

  03 — Schedule a review session for the following month: Use this follow up session to discuss initial usage and accountability, and to iron out any workflow kinks. Once this is complete, your client should fully understand what to expect when using this new tool!
RECOGNIZE OPPORTUNITIES FOR INCREASING YOUR VALUE

As cloud accounting technology continues to enable the automation of back-office tasks, accountants are empowered to move beyond compliance work and towards advisory services. Moreover, as the accounting app landscape continues to grow, it’s creating more opportunities for helpful advisory (e.g., cash flow management, virtual CFO services, business planning, expansion planning, app advisory, and so on).

ACTION ITEMS

☐ CONSIDER EXPANDING YOUR SERVICES:
Offering new services doesn’t just benefit your practice (i.e., by increasing your profitability). New services will also help your clients reach their goals, especially if you consider offering services such as strategic business planning.

Recommended resource:
• 7 Value-Add Services to Expand Your Accounting Practice by Firm of the Future

☐ CONSIDER RE-ENGAGING ALL YOUR CLIENTS WITH A NEW ENGAGEMENT LETTER EACH YEAR: If you’ve delivered value and met or exceeded expectations, you are well within your rights to increase fees and upsell new services (as per the point above). One of the most effective ways to turn this into reality is to re-engage your client every 12 months. This sends a signal to both parties that you are reconfirming your commitment to each other for a specific period of time, rather than leaving the relationship open-ended. It also provides an opportunity to reconfirm your mutual expectations. Plus, when you have your billing and payment processing automated (i.e., through Practice Ignition), you can use this opportunity to increase fees and get confirmation of up-sold services.

☐ MASTER THE ART OF UPSELL: Many accountants and bookkeepers don’t identify as salespeople. The thought of having to upsell or have sales conversations with clients can be anxiety-inducing. However, upselling shouldn’t be too challenging if you’ve consistently set and met (or exceeded) your client’s expectations. As a dedicated business partner and advisor, you have their business’s best interests at heart, and expanding their services will help them reach their goals more efficiently. You’ve earned their trust and loyalty, and like you, they’ll see it more as up-serving!

Recommended resource:
• The Art of the Upsell by Bookkeepers Hub

ACQUISITION
ONBOARDING
MONTHLY SERVICES

RETENTION, LOYALTY & EXPANSION

01 Be realistic about change
02 Recognize opportunities for increasing your value
CONCLUSION

Cloud accounting technology is changing client expectations

Accountants and bookkeepers were once seen as simply a necessity for businesses who wish to be compliant. Now, thanks to cloud accounting technology, accounting and bookkeeping firms can offer value that extends well beyond compliance work.

Cloud accounting technology is changing the way things are done. As a result, client expectations are changing, and the nature of the relationship between accountants, bookkeepers, and their clients are changing. In order to stay ahead of these changes, accounting and bookkeeping firms must proactively set expectations at every stage of the client journey – expectations that will ensure the best results for both the client and the accounting practice.

The future of your firm depends on your clients. Take measures to set expectations and you’ll be well on your way to building strong, productive, and profitable client relationships!
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