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The Power of Recognition

DECEMBER 21, 2010
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As busy season arrives, the focus turns toward long hours, back-to-back client meetings, stacks (or electronic drawers) of files, and the frantic pace of filing deadlines.

Unfortunately, the focus too often turns away from those strategic opportunities to sell work, to fill the pipeline for post-tax season, to generate leads, to advance your image and reputation, and to improve the morale of staff. As you ramp up for another tax season, consider the following two opportunities to engage your clients in ways that build your firm for the future.

Promote your best clients. Because of the CPA's often deep and historical relationship with the client, you understand the client's story in a way they, or others, often don't (see [Capitalize on Your Firm's Soft Assets](#)). You know your best client's story is special because you have ready comparisons in your other client relationships.

Take a few minutes to jot down why your best clients are unique. It may be the way they treat employees, how they reduced waste, how they increased efficiency, how they transitioned the business from one generation to the next, how they implemented a change, how they overcame a tragedy or obstacle, or how they contribute to a charity. The unique attributes of your best clients are many — and my guess is that as their key business advisor, you know them quite well.

Then, look for an opportunity to promote their story. It might be a nomination for a local, regional, national or industry award. It might be through a story with the editor of the local business journal, or through one of the industry trade publications. In fact, industry trade publications are often looking for story ideas and will welcome your suggestion and angle.

Whatever the venue, look for a chance to recognize your clients publicly, then ask the clients for permission to recognize them. Your clients will be flattered that you thought of them, and the gesture will likely enhance your relationship.

The benefit of this strategy, however, lies beyond the client relationship. The chances are high that you will be recognized in the process of the client being recognized. You will likely get mentioned during their award ceremony, recognized in their speech, or interviewed for their story.

You will be publicly associated with a successful client, which will only serve to enhance your image among other clients and prospects. You will likely be able to use the publicity in your firm's marketing documents and on your website, paying dividends for years to come.

Motivate your staff. As you slog through the tax returns and people become tired and stressed out, it becomes easy to forget how valuable a service you are providing to the client. And, if your staff is a level or two removed from the client, it becomes especially difficult for them to see or understand the positive difference they are making.

While helping clients comply with government regulations may not be the pinnacle of value-added service, the bigger picture is that you and your staff are helping them in all kinds of ways. You are helping them avoid unnecessary tax costs. You are helping them to meet their obligations and steer clear of regulatory and financial trouble. You are providing financial clarity, direction, and an independent perspective. You are in effect providing peace of mind to the client. The tax return and financial statement are the keys that open the door to helping the client with all of the other business and family questions they wrestle with, which are some of the truly value-added activities.

When people seem worn out and exhausted, ask your client to help you recognize your staff for these contributions. Invite clients to your staff meeting to talk for 15 minutes about why they like your firm, or why they stay with you when so many other things change. Ask them to tell your staff about a time when your firm made a difference for them. Ask them to tell your staff what is happening in their industry. Ask them to tell you what they like best about your organization. My guess is that you have helped your clients so many times that they will jump at the chance to help you. Again, they will be flattered that you asked and the activity will likely enhance your relationship. And if they can't come to a meeting, ask two or three clients to send a note or e-mail you can read at a staff meeting.

The client's recognition of your firm will do more than add a level of relationship depth. It will inspire your staff. It will rekindle their energy. It will encourage them to go above and beyond because they see firsthand the difference they can make for a client. I once brought two clients to a large staff meeting. The clients gave short, impromptu comments, answered a few questions from me, and took questions from the staff, all the while playing off one another's comments. Many of the staff said it was the best staff meeting they had ever attended!

A few well-placed words can go a long way toward building your firm. Whether it involves you recognizing your client, or your client recognizing your firm, that recognition can generate all kinds of benefits that will carry you well beyond busy season.

Lance Woodbury spent 14 years working as a non-accountant in consulting and leadership positions in a regional CPA firm (six years as a partner), and interacting with a number of firms across the country.

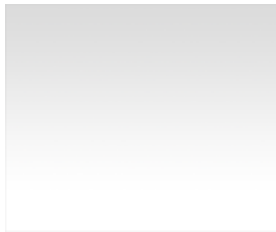
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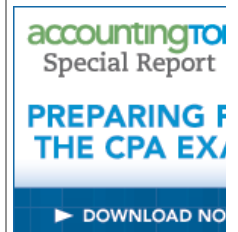
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