



HOW TO RETAIN A VALUED CLIENT

A price-focused market may put accounting firms at risk of losing clients to larger firms that are better able to leverage expenses. However, surveys show clients actually leave due to a breakdown in the accountant-client relationship more often than price. Since it costs eleven times more to acquire a new customer than to keep an existing one, it is especially important for firms to have a customer retention plan in place.

Use the tips to the right to help create a plan of action to keep clients satisfied.

Get to know your clients

Learn about your client's company and industry. Take time to understand their needs and expectations.

Demonstrate your expertise

Share your knowledge and convey how you can be a resource financially and strategically.

Exceed their expectations

Provide value-added services and rise to meet new client expectations.

Communication is key

Communicate often with your client about their goals and progress, and customize your messaging.

Encourage customer feedback

Ask for feedback after projects, and for clients to share their opinions and reviews of your work.



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Call attention to your impact on the bottom line and remind clients of your year-round services. Demonstrating your value is key to retaining clients.

Shelbie Lebron
Customer Success Manager

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