

***REPLACING***  
***- THE -***  
***RAINMAKER***

***WORKSHOPS***

***CLIENT SERVICE VALUES***

This workbook accompanies the audio workshop. It includes speaker's notes, which summarize the content covered in the workshop. It also includes activities, which you'll complete during the workshop, and a continuing education assignment, which you'll complete after the workshop. The continuing education assignment gives you a chance to apply the theory you learned in a practical setting. At the end, there's a quiz to test what you've learned as well as space to make notes and information on where to go to learn more.

## ***SPEAKER'S NOTES***

### **Learning outcomes**

- You'll learn to draw on your own personal experience as a customer.
- You'll learn about the benefits of great customer service.
- You'll learn a process for deciding on your own client service values.

### **Client service values**

- Knowing your client service values is a crucial component in delivering outstanding service to your clients.
- To deliver great service, you need to have a consistent set of standards that you adhere to in every client interaction.
- And not only do you have to know your values, but you have to live by them.

### **Out of the ordinary**

- Outstanding client service is a common claim that you'll hear from many accounting firms.
- Client service isn't a competitive advantage if your firm is claiming the same thing as everyone else.
- To deliver outstanding client service, you have to offer service that is out of the ordinary or uncommon.

### **You know it when you see it**

- Think about companies that are known for their customer service.
- There's something palpable about a great service experience.
- Customers recognize great customer service and it keeps them coming back.

### **A culture of great service**

- Companies with great customer service have built a commitment to customer service into their DNA.
- That commitment is embedded in everything they do.
- These companies aren't just claiming great customer service; they're demonstrating it day in and day out.

### **Know your values**

- How can accounting firms achieve great customer service?
- The first step is to understand your firm's core client service values.
- Once you've decided on your values, you have to ensure that those values permeate everything you do.

### **Land more clients**

- Outstanding client service sets you apart from your competitors.
- Outstanding client service helps you win more business.
- Outstanding client service is a crucial part of showing your clients that you care.

### **Keep your clients happy**

- Outstanding client service helps you retain your existing clients.
- If you deliver excellent service time and again, your clients will recognize it and value you for it.
- Your clients will stick with you and it will be harder for other firms to lure your clients away.

### **Word travels fast**

- By delivering excellent service, you'll get more referrals to new clients.
- If your clients have a good experience with you, they'll recommend you to their friends.
- Keep in mind that word-of-mouth referrals can just as easily work against you.

## **Deepen your relationships**

- Outstanding client service helps you deepen your relationships with clients.
- It also helps you learn more about your clients and how to serve them.
- By delivering outstanding client service, you should have the chance to learn more about your clients' wants and needs.

## **It's the little things**

- Why isn't outstanding client service more common?
- With all of the demands on accountants' time, something has to give.
- It's the little things that make the difference between "satisfactory" client service and "outstanding" client service.

## **Choose your adventure**

- You need to put a process in place for choosing your client service values.
- This process begins with reflecting on your own experiences.
- Then you need to decide on the values that matter to you and figure out how you'll commit to living those values.

## **Reflect**

- The first step is to reflect on your best and worst customer service experiences.
- Consider your own five-star customer service experiences and one-star customer service experiences.
- Look for commonalities between your experiences and those of others in your firm.

## **Know the stakes**

- The second step is to answer the question: Why is five-star service so important?
- It's going to be hard to live your client service values if you think client service isn't something that matters.
- If you want everyone in your firm to live by your values, you have to be clear about why they matter.

## **Know the risks**

- It's also important to understand just how detrimental one-star service can be.
- Brainstorm about the costs of bad service.
- Possible costs include that customers start shopping elsewhere and publically complain about your business.

## **Five stars**

- The third step is to define the characteristics of five-star customer service.
- Ask the key decision-makers in your firm what they most care about when it comes to customer service.
- Everyone will have their own priorities, but it always helps to see the commonalities.

## **The top of the top**

- The fourth step is to begin to decide on your own priorities.
- Ask each person to individually score their top 10 client service characteristics.
- Tally up the scores and create a list with between five and 10 characteristics. This is your list of client service values.

## **Execution matters**

- The fifth step is to figure out how to deliver on each of your client service characteristics.
- State specific things your firm can do to earn a five-star rating from your clients.
- Make sure you back up your promises with actual measures and metrics.

## **Know your true north**

- Now that you know your values, you can start living them.
- Defining your client service values is a way to make sure everyone is singing from the same hymnal.
- To your clients, it underscores that you have an enduring culture of client service.

## **Practice what you preach**

- One option for living your client service values is to conduct client service meetings with all your clients.
- At these meetings, you interview the client to better understand their needs, wants and issues.
- You also offer advice that benefits the client and you ask for referrals to new clients.

## **Cold, hard facts**

- As a result of this process, you'll have something meaningful to back up your claim of outstanding client service.
- You'll be able to clearly communicate what sets you apart from the competition.
- You'll be able to substantiate your claims by delivering real gains for your clients.

## **It's in their DNA**

- Companies with great customer service build their values into their DNA.
- They emphasize their core service values in training sessions for new employees and preach their values constantly.
- They put processes in place to make sure everyone is living by these values.

## **Empower your employees**

- Companies with great customer service empower their employees to make their own decisions.
- The Ritz empowers each employee to own and immediately resolve guest problems.
- Compare that with companies where employees are allowed to pass the buck.

## **Keep it simple**

- Nordstrom's has a simple rule: "Use best judgment in all situations."
- Like the Ritz, Nordstrom's trusts its employees and trusts them to do well by the customer.
- The company doesn't micromanage every piece of every interaction.

## **One size doesn't fit all**

- Companies with great service are flexible in how they live their commitment to customer service.
- They don't abide by a one-size-fits-all approach.
- They're creative in their demonstration of their values.

## **Identify and anticipate**

- There are always common themes among the best client experiences.
- Firms that deliver outstanding client service identify and anticipate needs.
- They're there every step of the way, not just in times of crisis.

## **A special place in your heart**

- Firms that deliver outstanding client service make their clients feel special, important and appreciated.
- Accountants who are skilled at client service make their clients feel special by remembering personal details.
- Firms that value client service regularly throw client hospitality events and use these occasions to thank their clients.

## **Rapid response**

- Firms that deliver outstanding client service are responsive to their clients.
- Clients commonly complain that they feel ignored by their accountant.
- Responding quickly makes a big difference in the accountant-client relationship.

## **Ears open**

- Firms that deliver outstanding client service ask for their clients' opinion and feedback.
- They are genuinely interested in hearing what their clients have to say.
- Your mantra when it comes to client service has to be "better is best."

## **In a customer's shoes**

- Think about how you as a customer would feel if you received the type of service described in this workshop.
- I know that I would be pretty impressed by that experience, and I bet you would be too.
- This is how you want your clients to feel.

## **Summary**

- Draw on your personal experiences to define what makes a great customer service experience.
- Think about the benefits of great customer service.
- Decide what's important to you and commit to following through.

## **ACTIVITIES**

If you're completing these activities on your own, please write down your answers in your workbook. If you're completing these activities in a group, please write down your answers individually. Then share your responses with up to two other people. Look for commonalities among everyone's responses and discuss any differences.

### **Activity 1**

How do you/does your firm demonstrate that you offer service that is out of the ordinary or uncommon?

### **Activity 2**

Without the benefit of having gone through the exercise described in this workshop, what do you think your/your firm's client service values should be?


## **CONTINUING EDUCATION**

Please follow the exercise we've described in this workshop. To begin, identify your client service values. Once you've identified your client service values, make your values "visible" to remind yourself of your commitment to them. For example, you could make your values your screensaver, hang a poster in your conference room or articulate your values in a firm newsletter. Then the hard work begins — you have to live your values in everything you do, from your interactions with colleagues to your dealings with clients. Ideally, you would complete this exercise as a firm, but you can also do it on your own or with other members of your department.

## **QUIZ**

1. Claiming to deliver quality work on time at a reasonable fee is a competitive advantage.
2. All firms that deliver outstanding client service have identical priorities.
3. Delivering a five star customer experience should be embedded in everything you do, from the way you treat your colleagues to the way you interact with your clients.
4. One of the intended consequences of providing outstanding client service is that it makes it harder for other firms to lure your clients away.
5. Providing outstanding client service helps you to deepen your relationship with your clients and get to know them better.
6. Providing outstanding client service generates referrals and helps you earn new clients.
7. It's reasonable to claim that you're responsive when your responsiveness policy states that you'll return all calls and e-mails within 24 hours.
8. Defining your client service values is a way to make sure everyone in your firm is singing from the same hymnal.
9. It's important to have measures and metrics that allow you to tell your clients how you communicate better and respond faster than your competitors.
10. In delivering outstanding client service, it's important to ask for your clients' opinion and feedback.

## ***NOTES***



## ***FOR MORE INFORMATION***

For more information about additional workshops, or other Replacing the Rainmaker products and services, please visit [ReplacingTheRainmaker.com](http://ReplacingTheRainmaker.com).