

Elevating the Client Experience in Accounting Advisory

By Dan Owens, CPA, and Jonathan Hernandez, CPA

Accounting advisory firms play a critical role in guiding businesses through complex financial journeys. However, many clients report dissatisfaction with the overall experience, highlighting a significant gap in practitioners' ability to meet client expectations and foster strong, trust-based relationships. According to ClearlyRated's 2024 Net Promoter Score (NPS) Benchmarks for the Accounting Industry, which summarizes the results of a survey that asks clients how likely they are to recommend their firm to a friend or colleague, the industry scored a 38%.¹ For comparison, here are a few well-known companies and their scores: Tesla (97%), T-Mobile (82%), and Starbucks (77%). Clearly, there is an opportunity for firms to grow and distinguish themselves. In this article, we discuss the key components of service delivery that contribute to outstanding client experience, including a personalized, proactive, and expert-driven approach.

Know Your Client

In today's increasingly complex financial environment, accounting advisory professionals must be able to demonstrate their technical expertise while also maintaining quality in the overall client experience. This begins with a thorough understanding of the client – their business model, the industry in which they operate, their short-term and long-term strategies and goals, and their needs and expectations – while staying current with how their industry and the marketplace are evolving. Understanding what is important to your client is paramount in delivering high value and quality services.

To achieve this, advisers should spend a considerable amount of time with clients during the proposal and planning stages, focusing on uncovering how their clients view success. By actively listening, advisers gain a deep understanding of a client's needs, challenges, what level of

involvement they would like to have, and what success looks like for them.

The information gathered should inform and drive the project's cadence and structure. This is followed by delivering work products on a timely basis that are simplified, user-friendly, technically sound, and relevant for decision-making. Subject matter experts should be involved in projects to ensure the highest quality deliverables. The information gathering process includes identifying potential risks early in the engagement and developing mitigation strategies. By doing so, advisers can provide clients with peace of mind and build long-term trust.

Understanding the client's knowledge of the related subject matter is key to tailoring an explanation of the deliverables and making them comprehensible and of the highest value. Clients should understand how the information and data they provide to the advisers can significantly impact the final deliverable; as well as how they are ultimately responsible for the completeness and accuracy of this information and data and conclusions in the deliverables. All this allows advisers to tailor their services to meet needs and expectations, leading to enhanced client satisfaction, trust, and loyalty.

Know the Key Stakeholders

In addition to obtaining a thorough understanding of your client's needs and goals, advisers should identify the stakeholders. Depending on the type of service offering being provided, this may include the client's external auditor, board of directors, audit committee, and investment banker, among others.

Once identified, it is important to develop relationships with the key stakeholders using a tailored approach, agreed upon with the client, that provides value to the client in managing the engagement throughout the delivery process. Proactively engaging with key stakeholders on

complex issues avoids surprises and builds credibility with all parties. For example, in engagements involving third-party stakeholders – such as external auditors – it is essential to consider and incorporate their perspective on technical matters (where available) to ensure alignment and support well-informed conclusions.

Maintain Technical Expertise

Equally important is developing a thorough understanding of accounting standards and Securities and Exchange Commission financial reporting standards. Whether advising on complex transactions or compliance with new standards, advisers must remain technically proficient and current with evolving standards, regulations, and related interpretations. Technical expertise should match and support what advisers have learned from their clients regarding their needs and the industry in which they operate. This ensures the advice provided is technically sound, highly relevant, and practical for the client's circumstances.

The financial reporting framework is constantly evolving, with new regulations, standards, and interpretations emerging frequently. Accounting professionals must commit to lifelong learning to stay updated with the latest developments. This can be achieved through attending industry conferences, participating in professional organizations, pursuing advanced certifications, and listening to podcasts and webinars. By doing so, advisers can enhance their expertise and provide clients with the highest level of service.

Technology

The integration of advanced technologies such as artificial intelligence (AI), machine learning, and data analytics has transformed the way accounting firms operate. These technologies enable firms to provide more accurate and timely insights, automate routine tasks, and

enhance the overall client experience. Examples include, but are not limited to, using AI to transcribe and summarize meeting notes (e.g., Zoom AI Companion), utilizing advanced financial reporting software (e.g., Workiva), and incorporating software that extracts and summarizes key terms from contracts. As such, accounting professionals must stay current with technological advancements and focus on ways to leverage technology to deliver superior service.


Feedback Loop

Given the accounting industry's average NPS score of 38% – which is low compared to the average NPS score in other business-to-business service industries – it is important for accounting advisory firms to incorporate a process for soliciting and assessing feedback. The process should be thoughtfully designed and agreed upon in advance with key stakeholders to establish the methods and frequency for soliciting feedback, which may include periodic

touchpoints throughout the engagement and/or post-delivery. One effective approach is to use surveys to gather direct and candid client feedback, which should then be followed by meetings with the respondents to review their insights. These conversations help confirm whether expectations were met – particularly those regarding timelines and management's perceived value of the deliverables – and explore how the feedback can be integrated into future service delivery. Finally, both during and after an engagement, team leaders should take the opportunity to educate the team and turn the feedback into a valuable learning opportunity.

Conclusion

The accounting industry faces both challenges and opportunities. To succeed, accounting advisory professionals must prioritize both technical proficiency and the overall client experience. This involves listening to how the client defines success on a project and meeting the expectations,

delivering technically sound, high-quality deliverables, and communicating technical matters effectively and focusing on the client's experience. As needs evolve, it is imperative that advisers adapt their service delivery processes to meet changing demands. By doing so, advisers can build strong client relationships, deliver a superior client experience, and assist clients navigate the complexities of the evolving financial landscape. 

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