

Cliff Notes

Creating Magic Moments by Jeff Kaylor

3 GEMS THAT APPLY TO YOUR CPA PRACTICE

1. You can create little miracles every single day.

Clients may not always remember what you did for them (or what you said to them) but they will remember how you made them feel. Learn about who your clients are so that you build a loyal life long relationship that is unforgettable. Create unexpected moments for your clients. If a client just had a child, make it a point to get them a baby gift before their next meeting or send it to their house. If a client just opened a new location, send them some office supplies or something they can hang in their office that is inspiring. These are the little things than can make a big difference in a client choosing to work with you year after year.

2. Break people's patterns.

You're a very busy business owner and the client that is coming in to see you also has a schedule of their own but take the time and take your time, especially in the beginning stages of the sales process. People don't want to work with boring and they easily forget mediocre, but they ALWAYS remember unexpected and interesting. How can you be different from other CPAs they have worked with? Put on music in the office when they are walking in, have coffee already brewed for them exactly how they like it (if you can remember it or write it down), and get to know their personal goals. Continue to search for all the ways you can better serve them.

3. The most successful people take a lot of notes.

The best way to picture my desk is like a collage of sticky notes. I take notes on everything because while we are all very smart and may have great memories, there is just NO way we can remember everything. Make sure to take notes about your clients, anything you may need to remember! Pay attention to the clothing they wear, maybe they're wearing a state college shirt in which you can ask them if they attended. Or maybe they mentioned a concert they went to and you can ask them how it went and maybe share your own music taste. Take notes on these things so that every single time you meet with a client they feel valued and remembered. It may seem cliché but *it's the little things in life that make a big impact.*