

Cliff Notes

Making Front Row Moments by Jon Vroman

3 GEMS THAT APPLY TO YOUR CPA PRACTICE

1. Make statements of purpose.

Life is all about creating those important moments that give us purpose. As a firm - and as individuals - it is important that we learn and grow from our mistakes and recognize the events that hold significance in our lives. There will always be “front row moments” that we can reflect on and see as life-shaping experiences. To be successful, you must make your clients feel that the moments that are spent with you serve a purpose. Investigate their lives and find out what they value. Make them feel as though you value them as individuals and that you are someone who can add meaningful moments into their lives. When giving a client a gift, think long and hard about what would make them feel like a priority. Turn a normal everyday response into a moment by bringing purpose and meaning on your own.

2. Amplify the excellence so you can silence the mediocre

It is important to magnify the strengths of your team, so the weaknesses are irrelevant. It's not enough to simply fix the problem. Instead, ask yourself what excellence looks like and consider the steps that you would have to take to achieve it. Oftentimes, this will take you past the problem, not just solving it, but moving far beyond it to far better and grander things. Attempt to identify the magic in your practice and showcase that to your client base. Prove to them that by choosing to work with you, they have taken the steps to security. Show them the positive impact that your team can make. Be able to demonstrate how overshadowed any weaknesses your team may have are, by the sheer quality and distinction you bring to the table.

3. First impressions are lasting impressions

What happens in the first 100 days of acquiring a new customer will determine whether or not they will be a lifelong customer. The effort that you put in to integrate them into your work will impact their relationship with you and your firm. The amount that you onboard the customer, your availability and the difference that you make in that time period will be the deciding factors for your clients. If this is all done with precision and effort, you will be able to cultivate the ideal relationship with that client. In doing this, they will be more willing to stick with your firm and not be tempted to look elsewhere because all their needs were fulfilled right from the beginning.