

Client Service Idea Book

Guidance, Tips, Strategies, Tactics,
Real-Life Stories, and Research Data

For Driving Client Satisfaction, Retention
and New Revenue

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Welcome to the Client Service Idea Book

Client service lays at the heart of everything a tax or accounting professional does.

Indeed, without clients, there is no firm, no practice and a practitioner isn't, in fact, practicing. Everything begins and ends with the client.

But while many things in the professional practice are codified, organized, and structured, client service is often left to be managed ad hoc. Client service, too often, is addressed only when there's a problem. But most practitioners understand that great client service leads to superior rates of client satisfaction and retention, which, in turn leads to stringer profits and revenue growth.

With this "Idea Book," we hope to stimulate the thinking of professionals who are seeking ways to improve their practices through improved client service. We're sure you'll find at least a few good ideas to put into use.

And we're grateful to the professionals who contributed so much of their experience and insight to make this book possible.

*Rick Telberg
President and CEO, Bay Street Group LLC
Editor and Publisher, CPA Trendlines*

How to Use the Idea Book

This book can be used for individual study or in group discussions.

For individual study, readers are advised to find a quiet hour or two with a pen to read through the book, taking notes and jotting down ideas as they emerge. Then the ideas can be gathered and developed into action plans.

For groups, it is suggested that the group discuss each idea as it surfaces, record the ideas on a flip chart or notebook and later sift the best ideas to develop into strategies.

– The Editors

About CPA Trendlines

CPA Trendlines at <http://cpatrendlines.com> is the online home of the freshest research and analysis in the tax, accounting and finance professions. Here you'll find the data and analysis you can use for your practice and your career, plus exclusive research, insights and commentary on the most pressing issues and fastest-changing trends.

About Bay Street Group

Bay Street Group LLC provides custom research, marketing, communications, strategic consulting, publishing and digital media for the professional tax, accounting and finance community.

Delivering state of the art services:

- > Research
- > Analysis
- > Communications
- > Strategic Planning
- > Lead Generation
- > Alliances
- > Business Development

With know-how and resources:

- > Experience, Insight, and Execution

Strategic Planning

Bay Street Group's unique and powerful perspective examines the finance and accounting profession from all angles providing unique insights sought after by:

- > CPA firms
- > Professional associations
- > Financial executives
- > Partners and suppliers to the profession

Marketing Communications

Bay Street Group's expertise cuts across multiple media platforms and a wide array of industries, associations and products. Bay Street Group consults to world-class brands... international, national and state associations... as well as local, independent CPA firms.

- > Print and electronic newsletter assessment, enhancement and management
- > Product launches
- > Direct marketing sales strategy and support
- > New media properties
- > Website architecture and content

About Rick Telberg

Rick Telberg is a veteran analyst, advisor, commentator, editor and publisher. He brings a unique background and perspective to research and advisory services for the professional services community.



Mr. Telberg may well be the accounting profession's most widely-known commentator through his long associations with the American Institute of Certified Public Accountants, Accounting Today magazine, and today, CPA Trendlines.

As an expert in management, marketing, media and e-commerce, Mr. Telberg has served as Senior Editorial Director of Pro2Net Corp., now www.smartpros.com, and as Director of Online Content at CPA2Biz, www.cpa2biz.com.

Previously, Mr. Telberg served as the early Editor-in-Chief of Accounting Today, and as Vice President/Group Publisher at Thomson Financial (now SourceMedia), overseeing Practical Accountant, Accounting Technology, and what is now www.AccountingToday.com.

Mr. Telberg was presented with a special citation by the National Society of Accountants for service to the profession and has served on a variety of boards and steering committees, including BKR International and the IBM Small Business Advisory Council. He is a graduate of New York University.

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