

CPA Client Engagement Video Transcript

Hi, I'm Jeri Quinn, executive business coach and founder of Driving IR. I work with individuals and firms to help them accomplish their goals and improve results. IR. Here's an example.

Certified Public Accounting firms CPA's need to go out and do business development more than they've ever had to before. Plus they have to be super careful not to lose clients to aggressive firms, or key staff for that matter. Employee loyalty and client loyalty go hand in hand. I worked with a firm on a ten week project focused on creating personal connections with clients and how everyone in the firm could contribute to the marketing to new prospects. Part of that process is helping people understand why personal connection is important and how to be a strong connector, not so easy if you're generally a numbers person.

We worked on understanding communication & behavior patterns, goal setting, and personal accountability. We looked at how the goals of the individuals dovetail with the goals of the firm to create engaged employees and a culture of empowerment. Of course, culture is very important. It can make or break a merger or acquisition, very common among CPA firms today.

Building up the firm's leadership, staff engagement and business development capabilities opens doors to all kinds of opportunities. Especially when you're concerned about your exit or succession strategy. How are you building up the value inside your firm?

1. Ask Yourself: My firm could use a coach because we want....and fill in your own blank. Then go to the [Ask Jeri](#) box on the side panel and tell me what you want. And then let's make it happen!