

Introduction:

It is not uncommon to hear that the client is unwilling to pay the fees or delays the same inordinately. Even that all services in all taxes, advisory is all in one lumpsum. This appears to be more in the moffusil locations. It is the view of the paper writers that the more the value we offer the clients, the same is bound to be remunerated quite happily. To deliver this value we require to have client focus.

Client focus is about understanding the client's needs in his business and understanding of what is important and valuable to him. This would translate into what is expected from us as an auditor/ consultant. Automatically the client would appreciate this approach and be willing to pay for such services.

Impressing the client using technical jargon like reverse charge mechanism under Section 66A if one were talking of import of services could be an example of what would put off the client. This may dissuade the client from sharing. Rather we could say that as the local service providers pay service tax on the same services, when such services are provided by non residents, they would be liable so as to provide a level playing field. Empathise while interacting with him.

A client would rather obtain the services of an auditor who hears him and his problem out. We at times interrupt and give our take on his issues before the client concludes, which may dissuade him from opening up in future. More importantly there maybe an opportunity hidden in his sharing. Keen listening is rare now a day.

Knowing what the client needs and wants would lead to the service that could surprise the client. Client satisfaction could lead to more work as also increased value for our services.

Do not treat routine small enterprises / clients with disdain. Remember that when starting off in practice it is the small clients work done well that gives us the confidence to handle bigger assignments. It is said that there is a possible learning in every situation. The satisfied client is your unpaid ambassador!

How to go about this?

The following steps would ensure client focus:

Step 1: Evaluate where you stand with regard to client focus: An exercise has been set out below to indicate the extent or lack of client focus we have.

Answer the questions and get your score as per instructions. Then see where you stand.

1. Do we proactively seek information from/about our client?
2. Do we really listen to the client?
3. Is the client aware of our strengths?
4. Is the client aware of our limitations?
5. Are we aware of the strengths and weaknesses of our clients?
6. Do we know what the client values? (This should not be based on our judgment/ presumption but based on what we have heard from him/her).
7. Do we know what the client wants and expects? (This surely does not refer to what we think is best for him/her).
8. Is the client at the centre of our practice?
9. Do we evaluate ourselves based on client's level of satisfaction?

Rate Each of the above from one(1) to five(5). 1=No; 2=At times; 3=Several times; 4=Most Times; 5=Yes- Always. Total the scores to show your extent of client focus.

A Score - 0-10-Hardly any focus on client.

B Score - 10-20-Need to be more proactive.

C Score - 20-30-Quite good - look for new opportunities.

D Score – 30- 40-Really Good- Keep it up

E Score – above 40 - You should be training other professionals to be leaders.

At this stage we may find ourselves in A, B or C/ If so read and take action as under:

Step 2: Profile your client with available inputs: A data sheet with the products, type of business, growth, profitability, financial comfort, major issues in past ++ can be prepared. While preparing this one useful aspect is that areas where we need some information would crop up. Ask and fill up that in the profile. In time this profile could be a useful tool to be used by anybody before they provide any service to the client.

Step 3: Client Feedback: Interact and know his needs, what he expects and values: Take his time and go with a set of questions. Over time one would become an expert in this interaction. More listening and less talking is necessary here.

Step 4: Define the present services: Examine the streams of services and methodologies which meet clients expectations and which ones are not met: This would ensure that the quality of ones services would be improving and become more client centric.

Step 5: Cost-benefit analysis: Take a status check after 6 months to see what has been the effect of the exercise and whether the clients are more satisfied and whether the same in converting into better experience for you while adding monetary value also.

Step 6: Deliver more than his expectations: Keeping the client in the “wow” state ensures that your client is your salesman/woman. They would talk to their friends about the high level of your service. Ensure a flow of clients who have already been sold about you. An enviable position.

[Tips] Best Practices for Achieving Client Focus:

- Treat past and long standing clients just as you would new and potential clients.
- Be prompt in your response to their queries.
- Be flexible and accommodative without losing independence or respect.
- Seek continuous or periodic feedback on what the client thinks.
- Take advantage of opportunities which present themselves. Remember that when you say we give up someone else says what a great opportunity!
- Be polite and train yourself in excellent communication skills by various modes such as by mail, written word or oral.
- Examine what common value adds can we provide the clients: Examples being updated, interesting /relevant information shared; important due dates being reminded etc.
- Ensure that we are abreast of the latest practices in accountancy, audit, systems.
- Changes in law like the Companies Act, Direct Taxes code and GST all should be studied keeping in view the beneficial interpretation of these provisions in the interests of the client.
- Get masters in the respective fields of an auditors practice and organise seminars/ interactive session if your clients are interested. This would help you to solve client’s problems even before they arise.

To conclude we are in practice to serve the client in whichever way possible while maintaining the highest ethical and professional standards. Professionals who start thinking of client satisfaction would find new clientele being attracted and service to present clients expanding. Hope this article is value additive for your professional practice.