



# The Ultimate Guide to Starting a Customer Experience Program for Accounting Firms

How focusing on the client experience can set your firm up for  
long-term success

# 1.

## Defining customer experience

**CUSTOMER EXPERIENCE (CX):** it's a hot topic and pops up almost everywhere you look. But what exactly is it?

Forrester Research defines CX this way:  
**“How customers perceive their interactions with your company.”**

These interactions can be anything from viewing your ads online and visiting your website, to the relationship they build with managers and partners at the firm, to the technology they use while completing an engagement with you—and everything in between.





# 2.

## Understanding the positive impact of CX

Now that we're on the same page about what CX is, it's crucial to understand why it is, and will continue to be, a critical part of any firm's strategy moving forward.

Often when we hear people talk about CX, it's almost in terms of something mystical or intangible—more closely related to a unicorn than a firm-wide business strategy. The truth is, it's anything but.

CX is a **proven strategy** that allows firms to increase offerings and add value to the business. In fact, a 2020 study from Watermark Consulting showed that companies it defined as “CX leaders” generated a “total cumulative return that was nearly three times greater than that of the CX laggards.”



**The bottom line?** Providing an exceptional customer experience results in happy, loyal customers. And happy loyal customers:

- Are less likely to leave
- Create more upsell opportunities
- Are not as price-sensitive
- Refer new customers
- Require you to spend less on acquisition
- Put less stress on your customer support teams

# 3.

## And avoiding what happens when you don't prioritize it ...

**The flipside is true** as well, of course.

When firms don't properly prioritize the customer experience, they're at risk of:

- **Not meeting revenue goals**
- **Slow organic growth**
- **Leaving existing client revenue on the table**
- **A disjointed and painful experience for the client**
- **Falling behind the competition who have better client experiences**
- **Losing clients to other firms with better client experiences**
- **Siloed and lost information**
- **Higher levels of client churn**



# We're not telling you anything you don't already know.

Most firms can all agree that CX is important. The real question is if everyone believes it's so important, **why isn't everyone doing it?**

In a 2021 study, on a scale of 1-5 respondents rated customer experience as a 4.5 in terms of how important client experience is to the accounting profession.

Customer Experience

4.5/5



# 4.

## Overcoming the challenges of starting a CX program

The real reason not every firm has put a CX program into practice is fairly simple: there are a number of challenges that can be difficult to overcome.

- **We don't have a journey map**
- **We haven't identified the different journeys based on service line or department**
- **We don't have an internal champion**
- **We don't have the resources**
- **We don't have the expertise**
- **We don't have the tools**
- **We don't have the time**
- **We don't know where to start**
- **We don't think it's a priority**



# 5.

## Getting Started

**Just getting started can be overwhelming.** One of the first things to know is that everyone (and I mean EVERYONE) is still trying to figure out how to best differentiate through CX. It's still a new concept and industry. Even the largest companies, who are seen as thought leaders in their relative

spaces are just trying to figure it out. The first takeaway, then, is that it's never too late to start, because nobody is so far ahead that you can't catch up.

So. You know what it is. You know it's important. The million-dollar question: how do you **actually** do it.

**Let's dive in!**



## STEP 1:

# Get the right team in place

When building a CX program, you'll need a few key roles:

- **Champion:** A true culture of CX starts at the top, which means you need a top-level internal champion. Leadership can help set the tone and expectations. This person should have direct influence with other leaders, as well as budget and resources. (Hint: it's often a partner or CMO).
- **Leader:** This is the person directly responsible for running the CX program. They'll take care of actually executing the ideas and measuring the results.
- **Cross-functional team:** A group of people from different services lines who have insight into current processes. This will not only help bring in different perspectives, but it will also help with buy-in from across the firm since they can be advocates in their individual departments.

Many firms don't have the resources for all of these roles to be the employee's only role. That's ok. The key is to find people who are passionate about the customer experience and are willing to bring new ideas to the table.





## STEP 2:

# Create a CX manifesto

**You need to have a documented vision and then share it.** It doesn't have to be complex. You can start with as few as three points.

Here's ours:

- We keep the customer at the heart of everything we do
- We listen to our customers and we're willing to act on their feedback
- Every department and every person is responsible for the customer experience

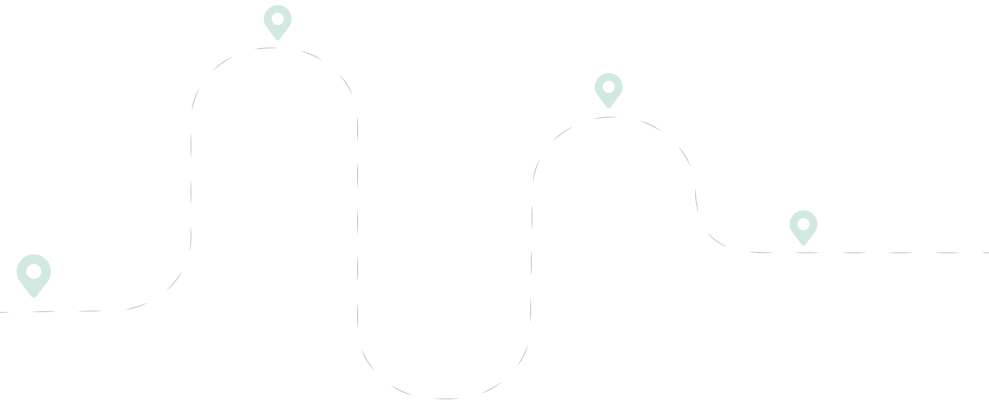
You need to get your whole firm on board. So create the manifesto and then share it. Send emails. Print posters. Put vinyl on windows. Incorporate it into every all-hands. Make a tik tok dance for it. Whatever it takes, get the word out and get your teams to buy-in.

Just a reminder: they should be **aspirational, not transactional.**



**STEP 3:**

# Document your current customer journey



**Customer journey maps can be one of the most intimidating pieces of a CX program.**

How can you improve an experience you don't understand? Unfortunately, you can't. But creating a customer journey map doesn't have to be crazy.

You certainly can bring in consultants, but you don't have to. It can be as easy as a bulleted list of the steps your clients go through with your firm. And you don't have to create a map for the entire firm right away. Start with one of your simpler services lines and grow from there.

Customer Journey: Current State	Step 1	Step 2	Step 3	Step 4	Step 5
What is the customer thinking or feeling?					
What is the customer's action?					
What is the customer's touch point with the business?					
What do we want to change about this step?					
How and/or why will we make this change?					

#### STEP 4:

## Come up with potential areas for improvement

**Pro tip: start with the low-hanging fruit.** This often includes the highest value touchpoints with customers; for example, during the onboarding or bidding process. These are critical points in the client experience that will set the tone for the rest of the client's interaction with you.

When choosing your first projects, carefully consider where you can get the most bang for your CX buck. Getting easy, early wins will demonstrate the power of an improved client experience internally while helping you win credibility for more difficult, future initiatives.



STEP 5:

# Set achievable goals

You can't rework your firm's whole process top to bottom at one time, so **start with small, achievable goals and make sure they're measurable.**

One other note on setting goals: set your own goals and compare your results only to your own goals. Goals should be focused on continuously improving from where you are now. A common mistake we see is that firms try to compare their goals and results to the largest companies in the world, like Apple or Disney, or even close competitors in the industry. Even when using standardized questions, the slightest changes in the way feedback is administered will introduce bias into the results.





## STEP 6:

# Gather client feedback

**It goes without saying, but to measure progress, you need to establish a baseline.** A simple survey sent to clients before and after you start making changes will give you an easy, concrete way to measure improvements.

NOTE: For smaller CX initiatives pertaining to a specific point in the customer journey, avoid using an NPS scale. Recommendation questions, like the core NPS metric, are often poor indicators of actual customer satisfaction.

If you get nothing else from this ebook, we want you to take away this one concept: **If you're not willing to change something, don't ask about it.** If you ask clients for their feedback and then fail to act on it, it will actually create a worse experience and lead to higher client dissatisfaction.



## STEP 7:

# Find technology to support CX

One of the biggest pitfalls with firms starting their CX journey is that they buy a piece of software or send out a survey and call that CX. The trap here is that technology can support your CX efforts, but it cannot be the sum total of your CX efforts. Your people and employees are just as, if not more, critical to a positive customer experience. You can't just rely on technology to out CX efforts that are deprioritized elsewhere. You must foster a culture of CX within your firm.

**Technology should be used to back up your other CX efforts**, to make you more efficient, and to make you more focused on the customer.



STEP 8:

# Take a deep breath and jump

**You're ready.** You've done the research.  
You have buy-in. You know where to start.

Now it's time to take a deep breath and  
take the plunge.

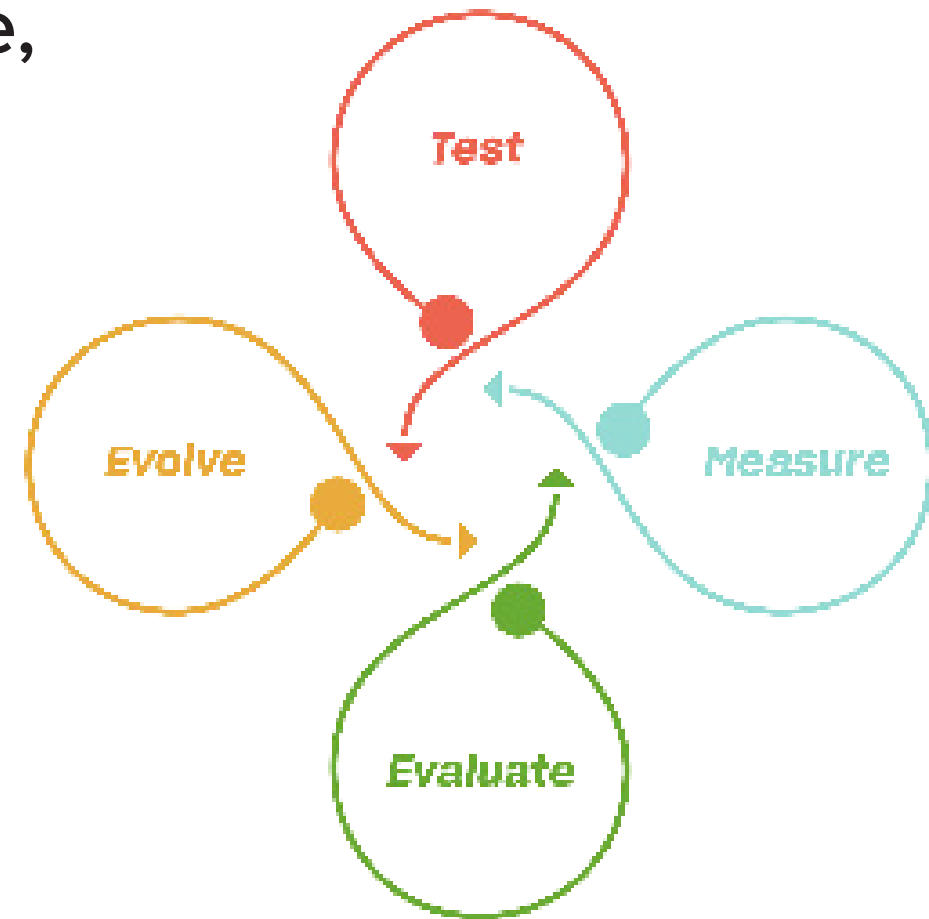


## STEP 9:

# Test, measure, evaluate, evolve, repeat

Create that first initiative and push it out to the world. This can be nerve-wracking, but the good news is in today's highly digital world, you can quickly change and adjust almost anything.

**The companies who are making progress are doing so because they are taking action and testing continuously.** The CX leaders have found that the cycle of test > measure > evaluate > evolve > repeat leads to real results. (Results in this case being an improved customer experience with all the attendant benefits of increased revenue and decreased churn.) No company or firm gets CX right on the first try. The important thing to remember is to measure your results and rely on that data to guide your future efforts.





STEP 10:

# Document new processes

When you find something that works, **document it comprehensively and share it widely.** This will allow you to re-create your successes and ensure the changes you've implemented are sustainable.



# 6.

## Hire with CX in mind

As you move forward with a new culture of CX, **you'll need to hire with CX in mind**. It may be helpful to bring in CX-centered positions. But even if you don't have the resources for a dedicated CX team, you can always expand the scope of your general hiring.

Can you incorporate CX-centric questions in the hiring process? Can you define a list of attributes you want to foster and then search for staff who meet those requirements?



# 7.

## Don't forget the employee experience

If you want to be known as a firm that leads in customer experience, you must also focus on the employee experience.

**Happy employees create happy customers**, and happy customers make happy employees. They call it a virtuous cycle for a reason.

To create an exceptional employee experience, follow the same steps as the customer experience program outlined above.



# 8.

## CX is the great differentiator— don't wait to get started

If we've learned anything working with firms of all sizes and types, it's that **CX sets you apart**. As more firms adopt a CX mindset, it will continue to be a differentiator. And those firms that evolve and adapt will continue to make insurmountable gains in customer experience—and business in general—over those firms who choose not to prioritize either.







**Suralink is the leader in PBC request list management, help accounting firms simplify the audit process while improving the client experience.**

The company's cloud-based application—built by accountants for accountants— integrates a dynamic PBC request list and assignment workflow solution with secure file hosting platform to serve as a single location for client interaction. Suralink's technology, combined with its industry expertise, helps more than 450 of the leading firms in North America and the UK ensure security, simplicity, transparency, and accountability throughout the audit process.

#### **CONTACT US**

[sales@suralink.com](mailto:sales@suralink.com)

801.203.0002

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