

# Intuit Accountants News Central

## How to Deepen Relationships With Existing Clients and Get New Ones



February 26th 2012 by Sharon Vetsch



In the past 14 years of being a [QuickBooks Advanced Certified ProAdvisor](#)<sup>®</sup>, teacher and consultant, I have never spent a dime on marketing or advertising.

You're probably thinking, how is that possible?

It's simple. Exceed client expectations. By expectations, I'm not just referring to completing projects before the deadline. Be available for them, listen to them and be there for moral support. A few minutes of your time can be the difference between one project or a client for a lifetime. Let me give you some examples.

### **Offer Free Support**

When I first began consulting, the industry standard was to bill clients for a 3-hour minimum. This seemed like an excellent move from a financial standpoint for me, but I quickly realized that this policy didn't generate long time loyal clients. I began offering what I call free "tech support." A client hires me to train them how to enter and pay bills. We meet and I explain the process. They take notes. They watch me enter and pay bills and then they complete the process with me watching. Three weeks later, they call me because they feel like they might be missing a step. I will walk them through the process and answer their questions at no charge. I can't express how much they love having this continued support.

### **Be Flexible**

When I initially meet with a client, I explain that I can teach them as little or as much as they want to know. I let them decide how involved they want to be in QuickBooks. If they are looking for a basic understanding, great. If they want to be an expert, fantastic! I make sure that my training meets their expectations but my willingness to tailor the training to their specific needs raises the bar.

### **Offer Affordable Alternatives**

I teach QuickBooks at a local community college. I encourage all of my clients to take my classes there. And yes, the classes are much less expensive than what I charge for one-on-one training. You could make the argument that I am losing money by offering them the opportunity to attend these classes, but this small gesture strengthens the foundation of my relationships with my clients. Clients appreciate the fact that I offer them affordable solutions. And, because of that, I'm the first person they call to hire when more complicated issues arise down the road; not to mention, the first person they refer to their friends and family.

### **Start at the Beginning**

In 2007, I was awarded Teacher of the Year. I believe I earned this honor, because when I teach, I start at the very beginning. Most clients don't want to admit when they don't know or understand things. Without this full disclosure, training can be a nightmare. I tell clients at the start of training that I am making the assumption that they don't know anything about accounting or QuickBooks. This way, they don't have to disclose what they do and don't know and it gives me a clean slate on which to build.

### **Think Outside the Box**

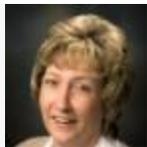
You never know who might be in need of your services. Over the past few years, I have worked with clients that were victims of internal fraud. In the process of these employees being prosecuted I developed a rapport with the state's attorney. On a completely unrelated matter, the attorneys were faced with a situation where evidence was contained in a QuickBooks file that appeared to be inaccessible. As a result of my previous work with the state's attorney, she recommended to the judge that my services be retained. Referrals can and will come from all sources. You just never know where your journey will lead you.

### **Once a Client, Always a Client**

Every year I host a Holiday Open House. It's a time to relax, mingle, eat and celebrate everyone in my life and business, and each year, my invitation list grows dramatically. Who makes the invitation list? *Everyone*. Every client and student that I have worked with since I first started my business is on that list. It doesn't matter whether a person is a current client or a student from nine years ago; everyone is invited. Once a client, always a client. Even if past or present clients don't attend, that invitation is a simple reminder to them that my door is always open. I can't tell you how many times I get a call or email regarding a new project from clients as a result of this invitation.

Being available and having an open door for your clients might seem simple – and it should. It's the simple things that will deepen your relationships with existing clients and also attract new great clients. Your clients will want to refer you to everyone they know and prospective clients will be happy to be on your waiting list. I am typically booked out a couple of weeks in advance and have a variety of wonderful clients (well, mostly wonderful). LOL.

**Editor's Note:** The QuickBooks ProAdvisor Program includes many tools and resources to help you deliver the best client service to help deepen relationships. Free QuickBooks software, dedicated support, training and certification are all included in the cost of the membership. To learn more about the program visit the [ProAdvisor website](#).



#### **About Sharon Vetsch**

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