Clients are the lifeblood of the firm. The majority of us feel very comfortable in the servicing of the client and using our technical abilities to “do what we say we will do”. Our discomfort comes during the next step in the relationship, the conversation that happens when you want to have a deeper relationship where you truly become their trusted advisor. The following 15 questions are a starting point for you to start the conversation with your current clients who will soon be more important clients!

1. Overall, how satisfied are you with your relationship with our firm?
2. What‘s the most important to you in terms of your relationship with our firm?
3. How satisfied are you with the performance of the following individuals at our firm?
4. Are you aware of the full range of services our firm provides?
5. How important is it to you that you have direct access to your information as a client of our firm, through something such as a client portal?
6. Which types of information we provide to you do you find most valuable?
7. What do you want your business to look like in the next year? Two years? Five years?
8. Do you plan to involve new offices or add new staff?
9. Tell me the part (s) of your business that are most frustrating to you?
10. What are the most critical challenges you face over the coming year?
11. What has the financial climate been like for your business?
12. How are you organized, what does your business chart look like and who are the key executives? What is your succession plan for the next 10 to 15 years?
13. Which services do you expect you will need in the coming year?
14. What do you most want to get out of the relationship you have with our firm?
15. How satisfied are you with the service value you receive from our CPA firm for the price you are charged?