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Client services: why you need to get personal

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According to the Office for National Statistics the economy shrank by 0.3pc in the first quarter of 2012, more than expected.

The outlook for British business is not optimistic, as austerity policies and the developing Greek crisis are thought likely to hamper recovery in the second half of the year.

What this means in practice is that companies will continue to keep a close eye on costs. Clients will refresh efforts to ensure that each pound spent is working hard. This may well include putting work out to tender to ensure a supplier is offering the best service and the best value for money.

The challenge for accountants in practice in this environment is not only to acquire new clients, but also to keep their existing ones. To achieve this aim, partners will need to get personal.

In an ideal world, the relationship between client and firm will be so solidly build that breaking the relationship with such a trusted business partner would be unthinkable. The reality is that the majority of business relationships are far more superficial.

Good client service, as practiced in many accountancy firms, includes some form of research to find out how well you have carried out your work and the level of client satisfaction; sending brochures promoting service lines that would benefit the client; setting benchmarks such as responding within 24 hours; meeting deadlines and generally doing what you say you will do.

While there is nothing wrong with any of these client service activities if carried out effectively (although experience shows that many firms don't track which brochures are sent to whom, how many brochures the client received in total, or whether they were well received. Similarly, there is frequently no objective measurement of the success of corporate entertainment or analysis of the results), these measures don't go nearly far enough.

To become the kind of business partner that clients consider integral to their future plans, partners must get under the skin of their clients. Partners will need to consistently show their commitment to the client and prove that they really want to help not just the company, but the individuals, too.

To move from client service at a corporate level to a personal level, partners will need to put themselves in their clients' shoes. It means taking the time to think about the client: the company and the firm's main contacts there, even when not actually working on billable tasks for them. Partners need to show that they care about the issues the client faces and not just in terms of cross-selling a new service.

Most partners have a recurring diary note to call their clients, to stay in touch and keep the relationship ticking over. For many it is one of those actions that gets put off and feels like a chore – partly through lack of time and partly through not knowing what to say. It is easy to put off tasks that make us feel uncomfortable. As a result, the monthly catch-up call tends to be perfunctory and only scratches the surface of the clients needs.

To get to a more relaxed level of chat with clients, partners need to get personal. They need to ask questions to better understand the individual, their aims and objectives, the pressures on them, and what success looks like to them. Once the client starts to open up, you will be able to get a more constructive handle on their business challenges and see ways to genuinely help the business and your client.

To explore a client's real needs, ask open questions: the best openers tend to be 'How?', 'What?', and 'Why?'. An expression that elicits more information is 'That's interesting, tell me more'. When asking open questions, partners should try to avoid asking too many questions around facts. While these may be of interest and of use to the firm, they are seldom of use to the client. Instead, partners should ask questions around the issues the client is facing, and about the implications of leaving these unresolved. Partners should listen hard to pick up things that are of personal interest to the client, such as concern about a particular issue.

Time is the enemy of customer service in most firms. Partners are so busy with client work, that they find it hard to dedicate time to calling or meeting clients to build the relationship, or to set-aside time simply to think about their clients and the environment in which they are operating. But half an hour in the diary twice a week would more than pay back the time invested if it stops a client going to tender.