

2016 NEW YORK ACCOUNTING SHOW & CONFERENCE

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THE TECH SAVVY CLIENT IS HERE ARE YOU READY?

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@JK_at_TR

Jordan C. Kleinsmith / Product Manager, Tax @ Thomson Reuters

INTRODUCTION

- A brief introduction to Jordan & Thomson Reuters
- A review of the profession's top challenges

THE TECH-SAVVY CLIENT IS CONNECTED

Many firms make unfortunate (and potentially fatal) assumptions about their clients' connectivity & aptitude.

- What is the state of internet connectivity today?
- Changing client expectations for timeliness
- Defining the tech-savvy client "persona"

THE TECH-SAVVY CLIENT IS INFORMED

Firms must understand *how* clients are finding out about – and evaluating – their services, and act accordingly.

- Through what "channels" does today's consumer discover you, your services, & your differentiators?
- Technology as differentiator
- The new consumer buying cycle

THE TECH-SAVVY CLIENT LABOR POOL

It's not just about winning clients; technology helps fight the massive talent shortage facing the profession today.

- What kind of firm attracts young professionals?

TECHNOLOGY & CONSUMER TRENDS

The profession faces a number of challenges both today and in the coming years – are you ready to face them?

- DIY & commoditization of tax compliance
- How does society categorize CPAs?
- "The Great Tax Shift"
- Changing client perceptions & expectations
- So what's the opportunity in all of this?

HOW CAN PRACTITIONERS TAKE ACTION?

The time to act is now, and there is plenty that an accounting professional can do to both mitigate business risk and maximize on opportunities.

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<https://goo.gl/zGT7wE>



- Branding: firm brand, personal brand, & your firm's "distinctive competence"
- Once you determine your distinctive competence, how do you *position* it appropriately to prospects & clients?
- How the use of technology can reinforce your brand
- Conversely: what does not using tech say about you?
- What does science say about the impact of aesthetic?
- Implementing new technology for:
 - New client intake
 - While your clients are waiting in-office
 - Collaborating with clients in-office
 - Collaborating with clients out-of-office
 - Starting or wrapping up a tax engagement
- Your web presence: existent, or non-?
- OK, you have a presence – but what's your *strategy*?
- "The Mobile Web" & its implications
- Are you erroneously positioning portals to your clients?
- ...what about to yourself? Identifying their true ROI
- Positioning portals *properly* (whoa, triple alliteration!)
- Effectively managing online reviews of your firm
- Social media: a huge, largely untapped opportunity
- Assessing your opportunities & taking action

WHAT NEXT? CHECKLIST FOR SUCCESS

- Google, Bing, & Yahoo your firm; what's good/bad?
- Get social: LinkedIn, Facebook, & Twitter (in order)
- Get a website (or consider a redesign if due for one)
- Create both internal & external positioning statements
- Implement a comprehensive secure portal strategy
- Implement electronic intake sheets / in-office reviews
- Create persona(s) for your tech-savvy client type(s)
- Create your own prioritized action plan



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