



Through the looking glass of a client...

by Chanon Collins

As members of professional organizations, we all strive to present ourselves in the best light for prospective clients. We tout expertise, experience, and efficiency to capture attention and enlighten the masses. How quickly we forget that the public is not always impressed by glitz and glamour. Just as we tend to shy away from the superficial and look for substance, so do those we wish to have as clients. It is time for those of us in professional organizations to stop and examine ourselves from our clients eyes – what exactly would we see?

The populous has a discerning eye when selecting an organization with which to conduct business. During this process, firms are examined and placed into three distinctive categories – experts, those with experience, and those known for efficiency. Those searching for professionals will base their selection on companies who best qualify to address their needs and concerns. Once the selection is narrowed to the applicable arena, more probing questions are delivered – “For whom have you worked?” “What are your capabilities?” “What is the depth of your personnel?” and lastly, a list of reference is requested to check to see that what you have been saying about your firm is true.

Once a firm reaches this point in the selection process, it tends to steer in two possible directions – the firm will continue to promote their standard spiel or they will stand beside their firm image and present the people and value associated with their name. This is a crucial point for both parties. It is this point that Albert Einstein lends advice – “try not to become a man of success, but a man of value.” With value as the cornerstone, success is sure to follow.

Hopefully, your firm will choose the correct path and meet with the prospective client to present the people, values, and knowledge of your firm. It is crucial during this time that you establish an empathetic tone for your conversation. You must remember that the client, by nature, will be dubious of your intentions. Look through the client’s eyes to experience their emotions at hand. They will most likely feel insecure, worried, exposed, skeptical, and suspicious. If glitz and glamour are presented during this time, any rapport previously established has been destroyed.

Take a proactive stance during this initial meeting to establish the beginnings of a long and trusted relationship. The client wants to know that you recognize him or her as an individual and that you are truly concerned

ALLEN PRITCHETT & BASSETT, LLP
POST OFFICE BOX 349, TIFTON, GEORGIA 31793
229.382.6960 FAX: 229.382.6992
WWW.APBCPA.COM

APB...WHERE TRUST IS A TRADITION.



about his or her welfare and not just anticipating the closing of a deal. Use this time to illustrate that you have done your homework – let the client know that you have conducted research into the industry and the competition. Take time to read the client’s annual report – personal interest is key.

We are all familiar with the adage “hindsight is 20/20,” but do we retain the lessons learned? The next time your firm reaches out to a prospective client, stop and examine yourself and your team from the client’s point of view...and always remember that “experience is one thing you can’t get for nothing.” – Oscar Wilde

ALLEN PRITCHETT & BASSETT, LLP
POST OFFICE BOX 349, TIFTON, GEORGIA 31793
229.382.6960 FAX: 229.382.6992
WWW.APBCPA.COM

APB...WHERE TRUST IS A TRADITION.



ALLEN PRITCHETT & BASSETT, LLP
POST OFFICE BOX 349, TIFTON, GEORGIA 31793
229.382.6960 FAX: 229.382.6992
WWW.APBCPA.COM

APB...WHERE TRUST IS A TRADITION.



ALLEN PRITCHETT & BASSETT, LLP
POST OFFICE BOX 349, TIFTON, GEORGIA 31793
229.382.6960 FAX: 229.382.6992
WWW.APBCPA.COM

APB...WHERE TRUST IS A TRADITION.



ALLEN PRITCHETT & BASSETT, LLP
POST OFFICE BOX 349, TIFTON, GEORGIA 31793
229.382.6960 FAX: 229.382.6992
WWW.APBCPA.COM

APB...WHERE TRUST IS A TRADITION.