

WHAT MAKES A GOOD CLIENT

Clients are our customers that pay our salaries and present us with stimulating opportunities allowing us to grow. There is no such thing as a bad or nuisance client, although there are clients that sometimes do bad or nuisance things. Following is a listing of what makes a good client.

1. Clients that do what they say they will do and who do not delay sending us what we ask for
2. Clients that do the work organizing their documents before they provide it to us
3. Clients that give us estimated amounts, that tell us they are estimates and how they arrived at it and why they cannot provide the actual amounts
4. Clients that understand the basis for our fees and the greater value they receive for it
5. Clients that pay their bills promptly
6. Clients that call the partner to complain about a bill instead of “complaining” by sending a note to our “bookkeeping department”
7. Clients that complain right away to the partner when they are upset with something, and not to a staff person who happens to be at their office at that moment
8. Clients that understand that we sometimes make a mistake, who accept a rational and reasonable explanation and who won’t keep bringing it up months and years later
9. Clients that make us explain clearly what we tell them to do, and who don’t give the go ahead without fully understanding what is to be done
10. Clients who review the work we send them when it is received and who don’t sit on it until eight minutes before it needs to be filed or sent to a bank
11. Clients that use technology fully
12. Clients that are not litigious
13. Clients that understand that taxes need to be paid to maintain our society and that we do not make the rules that cause them to pay taxes
14. Clients that realize that banks and finance companies need back up and documentation when they lend funds, and that there is a cost to develop that data, and that it is not our “fault” the work is needed
15. Clients that occasionally thank us for our efforts on their behalf
16. Clients that appreciate the long-term benefits of our relationship and recognize that we will always “be there” for them
17. Clients that refer potential clients
18. Clients that are happy with their lives

Prepared for guidance and illustration purposes by Edward Mendlowitz, CPA, Partner, WithumSmith+Brown, PC