The accountant's blueprint for delighting clients

A worksheet to identify and solve client pain points to sharpen your competitive advantage

✳ ShareFile™

The biggest differentiator for accounting firms today is the client experience. Research shows organizations that focus on creating a better experience for clients can see an [80% increase](#) in revenue. There are easy improvements your organization can make right away, starting with client–facing workflows. Processes like onboarding or PBC lists typically overload clients with tedious, manual tasks and open the door to errors and potential security gaps. Using this worksheet, you can quickly spot and fix these areas to elevate your client experience.

Number of tools

List all the tools your clients need to communicate and work with your firm throughout an engagement. On average, company departments use 87 SaaS products.

Purpose	Cost

Ask yourself: *Can you consolidate products to prevent clients from constant app–switching? More tools complicate processes for clients and increase the risk of a security breach. Plus, consolidation can save your firm money.*

Repetitive processes

List the tasks clients repeatedly do, like filling out the same information on multiple forms.

Repetitive process	Description

Ask yourself: *Can technology be used to eliminate some client tasks? Repetitive tasks take up valuable time for everyone and create a perception of inefficiency.*

Manual processes

List tasks that require manual work for clients, like downloading or mailing documents.

Manual process	Description

Ask yourself: *Could client experiences be improved by digitizing document workflows? Digital document management and PBC lists give clients greater visibility, reduce errors, and eliminate unsecure file sharing.*

Long lead times

List client–facing processes that take the longest or are often delayed.

Slow process	Description

Ask yourself: *Could you automate internal workflows to deliver client services faster? When service delivery is delayed too long or too often, your firm loses the opportunity to deliver value.*

SaaS features to keep in mind as you explore solutions

With a clearer picture of your clients' pain points, you can make immediate improvements by automating, eliminating, or consolidating tasks. How? With the right technology. Accounting-focused SaaS products that help enhance your client experience often have these features:

Easy-to-use automation

Automation can significantly improve efficiencies when it comes to manual or repetitive processes. It reduces errors and frees up time to spend with clients. Ideally, your solution should have pre-built or templatized workflow automation.

Data access management

Look for a tool with lots of customizable file-sharing permissions. This lets you tailor permissions based on recipients' roles and helps prevent the wrong eyes from seeing your content. It also gives you a secure way to exchange files without adding more steps to your workflow.

All-in-one solution

Avoid subscribing or purchasing too many tools that can become difficult to track and use. Look for a tool that houses as many of the capabilities you need as possible. The fewer costs and training sessions, the better.

User friendly

Find a tool that is easy to use, even for people with limited technical experience. This way, the tool won't overwhelm and prevent clients from using it. Tools that offer ease of use are often accessible from any location and across devices.

Robust security

Look for a tool that offers multiple security layers so you can customize them to meet the specific needs of you and your clients.

With a simple evaluation of your client-facing tools and processes, you can quickly find new solutions for simplicity and ease. Learn how your organization can automate, digitize, and consolidate your document management for better client experiences.

Visit ShareFile.com to learn more.