



Put Clients First, Always!

Regularly chat with clients to understand their goals and challenges. Tailor our services to fit them like a glove. Put yourself in their position – how would you like to be dealt with?



Communicate Like a Pro

Set response time goals for emails (8 hours), calls (same day), new client inquiries (4 hours). Use Iris/Outlook tools to keep track and stay on top of things. If you can't action the request then provide an acknowledgement with a timetable. Under promise, over deliver!



Build Bonds, Not Just Business

Assign dedicated account managers, check in regularly, and host fun client events to build a sense of community.



Know Thy Client Inside Out

Enhance on-boarding, refresh client profiles, and offer tailored advice based on industry trends.



Be the Sage of Business and Tax

Stay updated on the latest regulations, train staff, and develop sector-specific expertise.



Deliver Reports with Pizzazz

Use custom designed templates and offer various delivery options like digital dashboards, PDFs, or printed documents.



Embrace Continuous Improvement

Implement metrics to measure success, collect feedback, and track the impact of our advice.



Learn from Every Goodbye

Record reasons for client departures, identify areas for improvement, and make changes to prevent future losses.



Tackle Constraints Head-on

Overcome constraints with training, resource allocation, and a positive mindset.



Uphold Courteous Professionalism

Ensure all staff adhere to ethical guidelines, provide regular training, and promote a culture of honesty and transparency.