

Intersections of Growth

How User Experience (UX), Employee Experience (EX)
and Client Experience (CX) Drive Firm Growth

Meet the Panelists

Combined we represent **nearly 100 years** of experience, **23 feet** of height, and **5 pets**

MODERATED BY:



Eric Gregg | MBA

Founder & CEO

[ClearlyRated](#)

[linkedin.com/in/ericgregg/](https://www.linkedin.com/in/ericgregg/)

“Believes cake is better than pie, and it isn’t even close.”



Mitch Reno | Principal

Director of Client Experience

[Rehmann](#)

[linkedin.com/in/mitchell-reno-a0b6054/](https://www.linkedin.com/in/mitchell-reno-a0b6054/)

“Was voted best dressed in high school 40 years ago”

PANELISTS:



Jen Hertzog | Principal

Senior Manager

[KCoe Isom](#)

[linkedin.com/in/jennyhertzog/](https://www.linkedin.com/in/jennyhertzog/)

“Once played in the state championship flag football game.”



Gabe Tevrizian

Director of Marketing

[REDW](#)

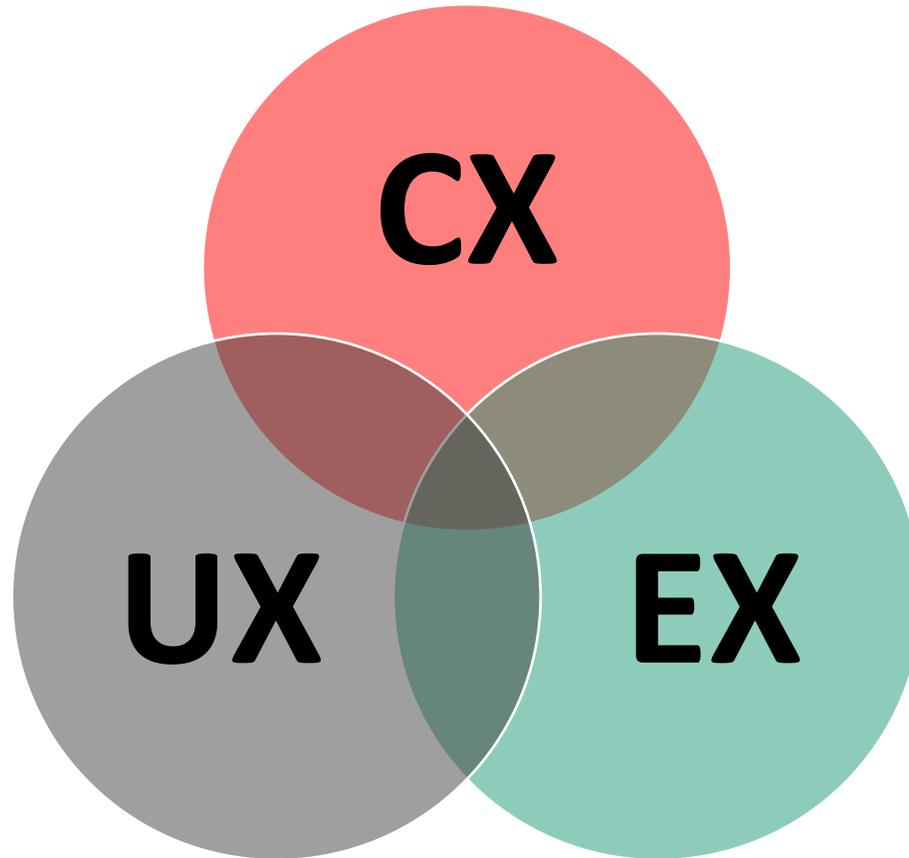
[linkedin.com/in/gabe-tevrizian-592395a/](https://www.linkedin.com/in/gabe-tevrizian-592395a/)

“Submitted 3 of the 10 tallest peaks in WA in one summer.”

Introducing Today's Topic

The Intersection of EX, UX & CX Across the Client Journey

A Framework For Discussion



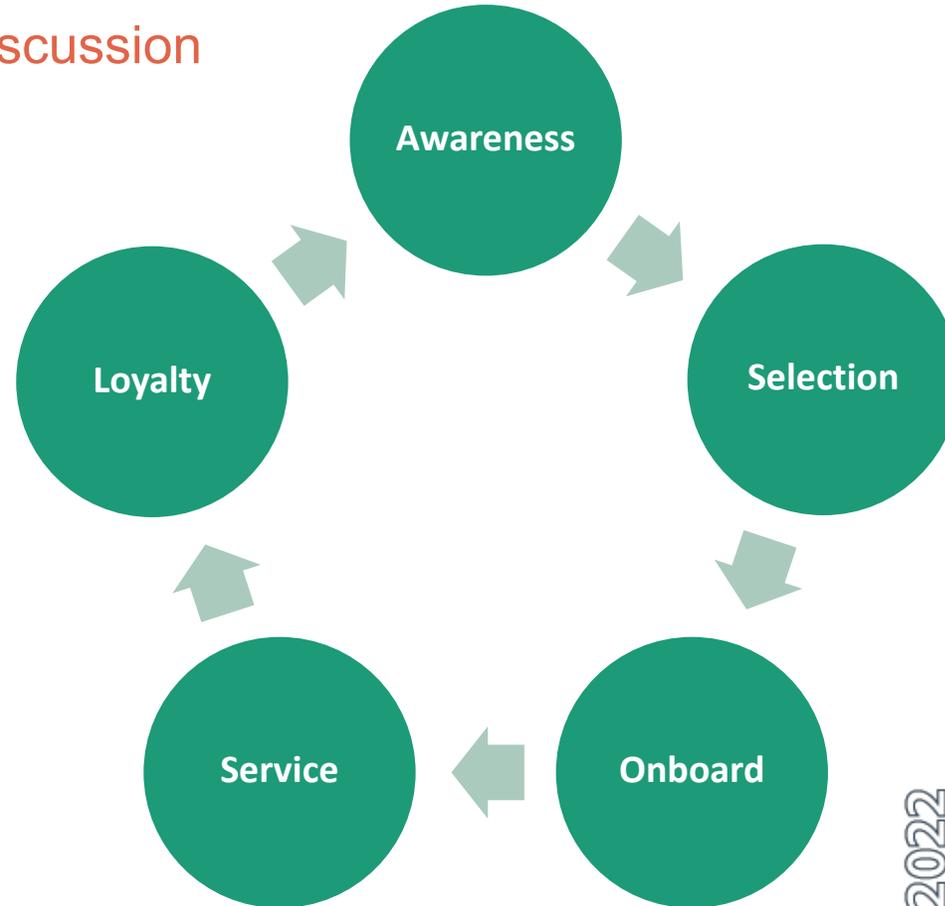
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The Intersection of EX, UX & CX Across the Client Journey

Client Journey Framework For Discussion



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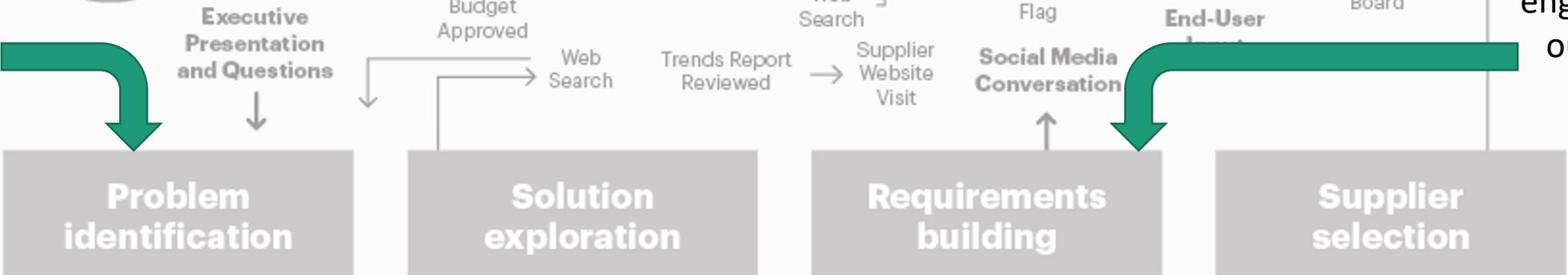
The Role of the Modern Day Marketer

The Client Journey - Awareness

Start

When we **THINK** prospects engage with our firm.

When most prospects **ACTUALLY** engage with our firm.

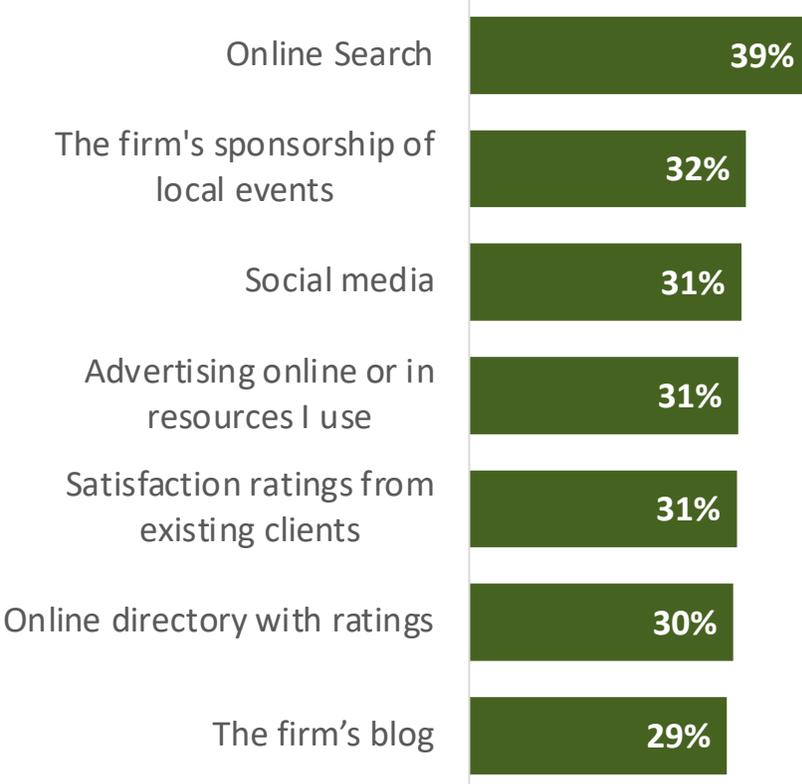


Purchase decision

B2B Buyers Do Their Research **BEFORE** Reaching Out

Top Resources When....

Creating a short list of potential firms



Determining top 2-3 firms

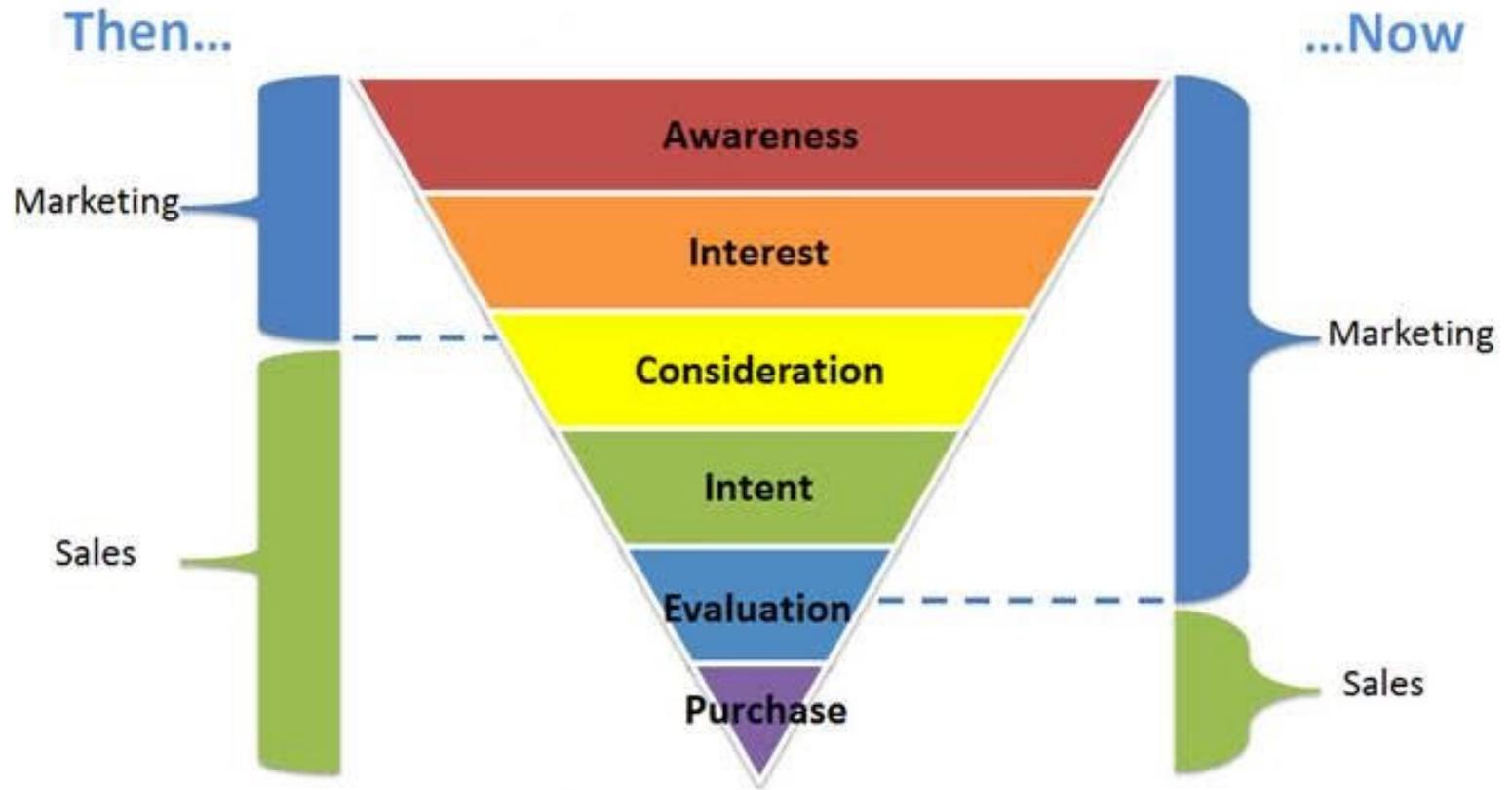


Making final decision about which firm to hire



The New Marketing & Sales Funnel

The Marketing Funnel Has Changed



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Demand Profiles



01

RELIEF

Clients feel relief from worry, stress, and shame because the right team is managing and guiding financial health.

02

EXTENDED TEAM

Clients rely on the security that results from REDW functioning as an augmentation of their team or organization.

03

GROWTH

Clients want a financial partner that provides them the freedom and flexibility to focus on business growth.

04

Ease of decisions

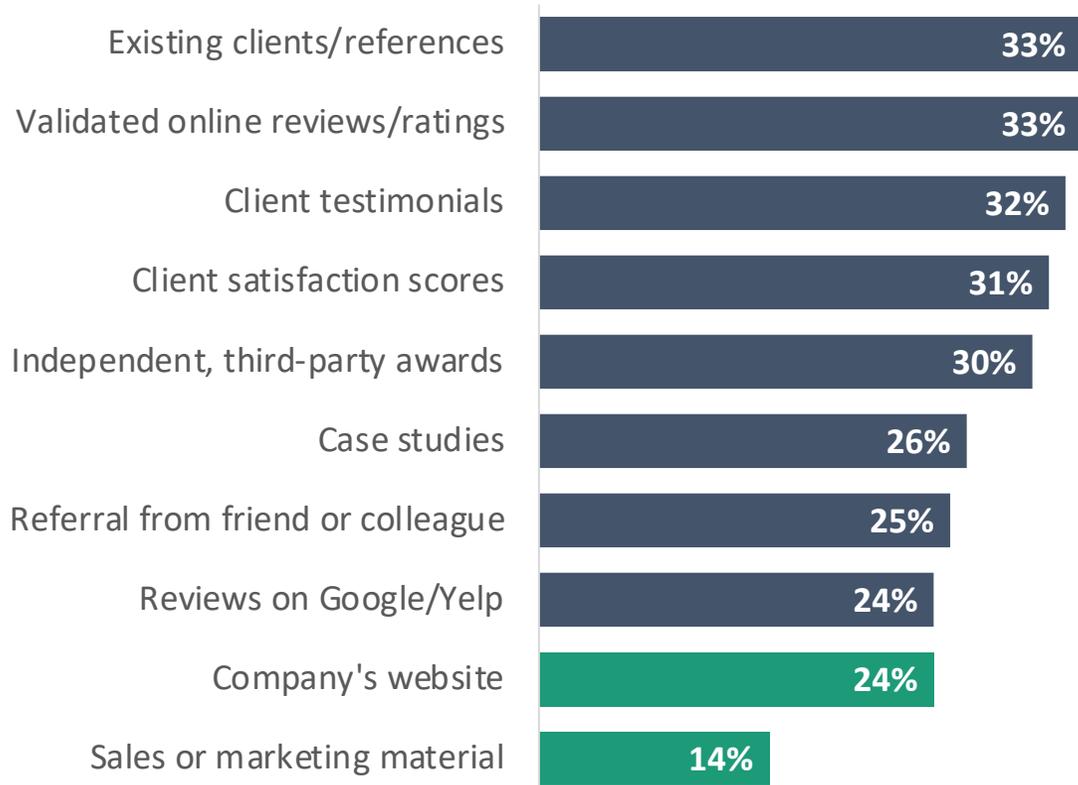
Clients want a partner who has the knowledge necessary to help them make fast and intelligent decisions.

AWARENESS QUESTIONS?

The Client Journey - Selection

Buyers Seek to 'De-Risk' Decisions About Trusted Advisors

Most Persuasive Resources for Buyers

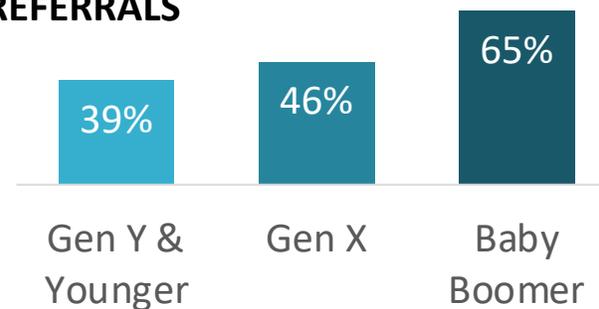


SOURCE: ClearlyRated

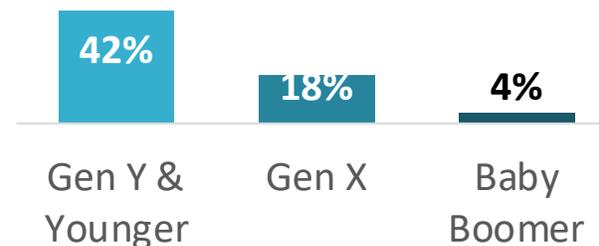
WHAT OTHERS SAY ABOUT YOUR FIRM

WHAT YOU SAY ABOUT YOUR FIRM

REFERRALS



ONLINE REVIEWS



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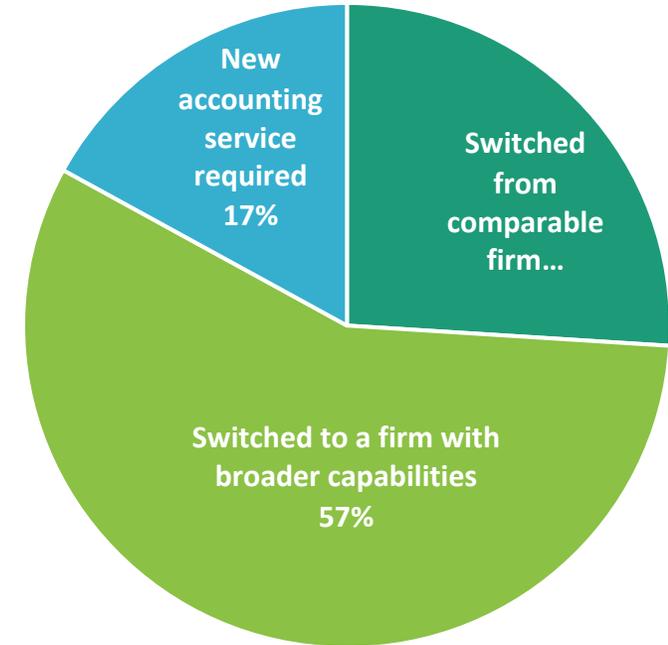
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Top reasons clients chose their current primary accounting firm

Most Selected Options



SOURCE: ClearlyRated



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SELECTION QUESTIONS?

The Client Journey - Onboarding



WELCOME ABOARD

CLIENT NAME/LOGO HERE

REDW^{LLC}
CPAs | Advisors

redw.com

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ABOUT OUR RELATIONSHIP

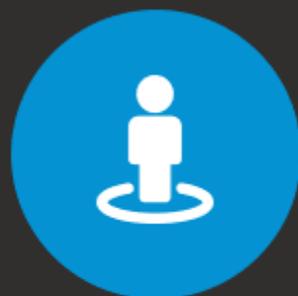
CLIENT NAME HERE

We're excited to work with you.



MEET YOUR TEAM

Roles, responsibilities and contact information



KEY TOUCH POINTS

Important communication milestones to facilitate our close collaboration



NEXT STEPS

A checklist to get us all off to a running start, plus new ways REDW can help

KEY TOUCH POINTS

KICKOFF MEETING

A chance for both parties to get acquainted, set expectations and priorities



MAY 2022

60 DAYS IN



INITIAL CHECK-IN

Getting off to a great start!
Revisit expectation alignment.

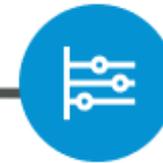
MILESTONE MEETING

Opportunity to learn more about your business & priorities outside the scope of the engagement



POST PROJECT

ANNUAL



CLIENT SURVEY

An opportunity to provide feedback on overall client experience

NEXT STEPS

1

UNDERSTANDING OF OPERATIONS

- Interview management to understand internal controls and accounting procedures
- Document key processes, including closing and payroll

2

SOFTWARE CORRECTIONS

- Document all outstanding software issues and determine underlying causes
- Review current customizations and correct software bugs

3

ACCOUNTING POLICIES & PROCEDURES

- Develop MRWM-specific accounting policies and procedures
- Recommend software maintenance plan and training

ONBOARDING QUESTIONS?

The Client Journey - Service

Service Quality on the Rise In Accounting

Net Promoter Score® rose for 4th consecutive year

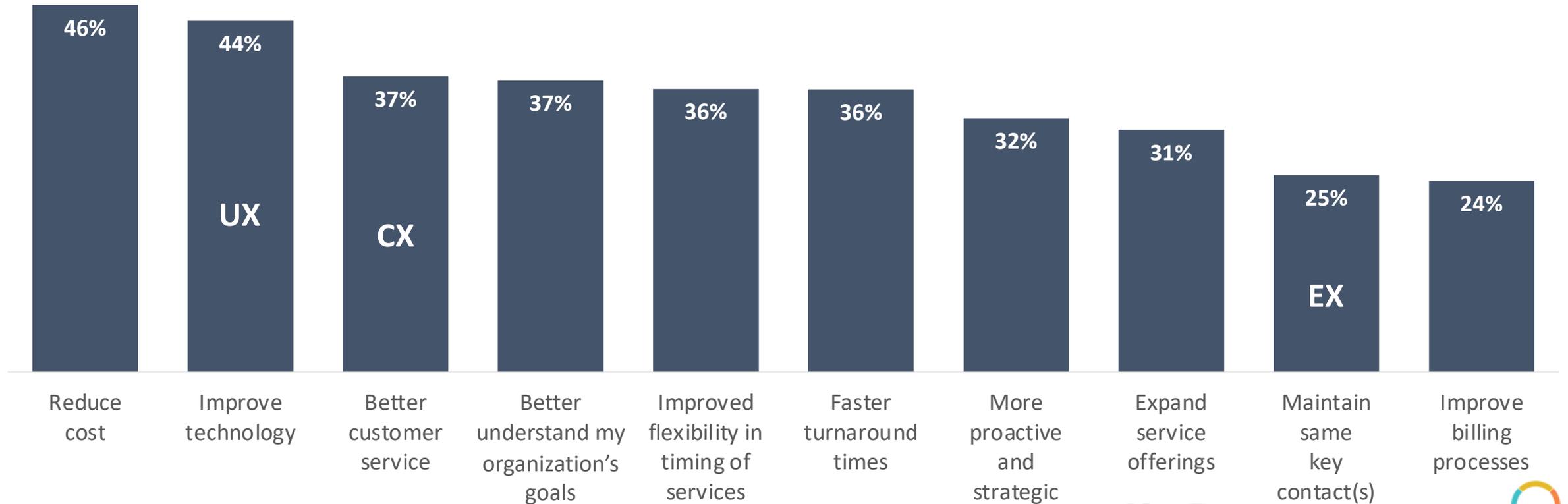


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Top items on accounting clients 'wish lists' of service



SOURCE: ClearlyRated

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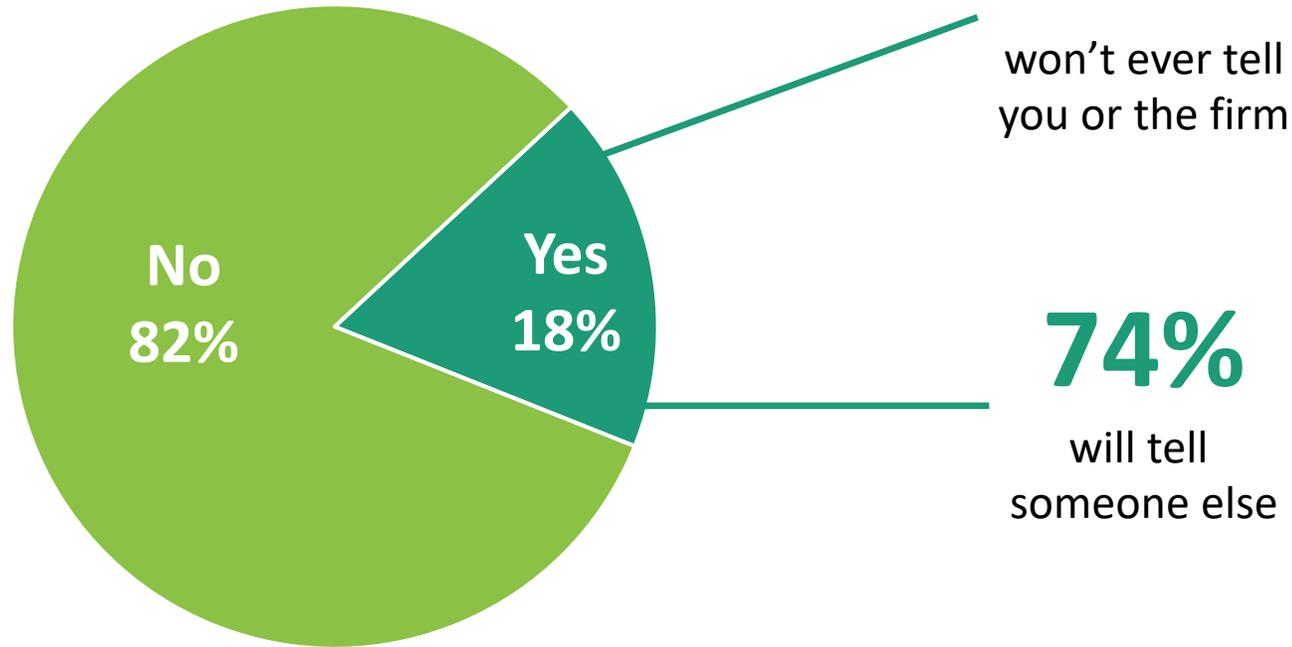
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Solid Service Recovery is Key

1 in 5 clients will experience an issue – but will they tell you?

In the past 12 months, have you experienced a service issue with your primary accounting firm?



16%

won't ever tell you or the firm

74%

will tell someone else

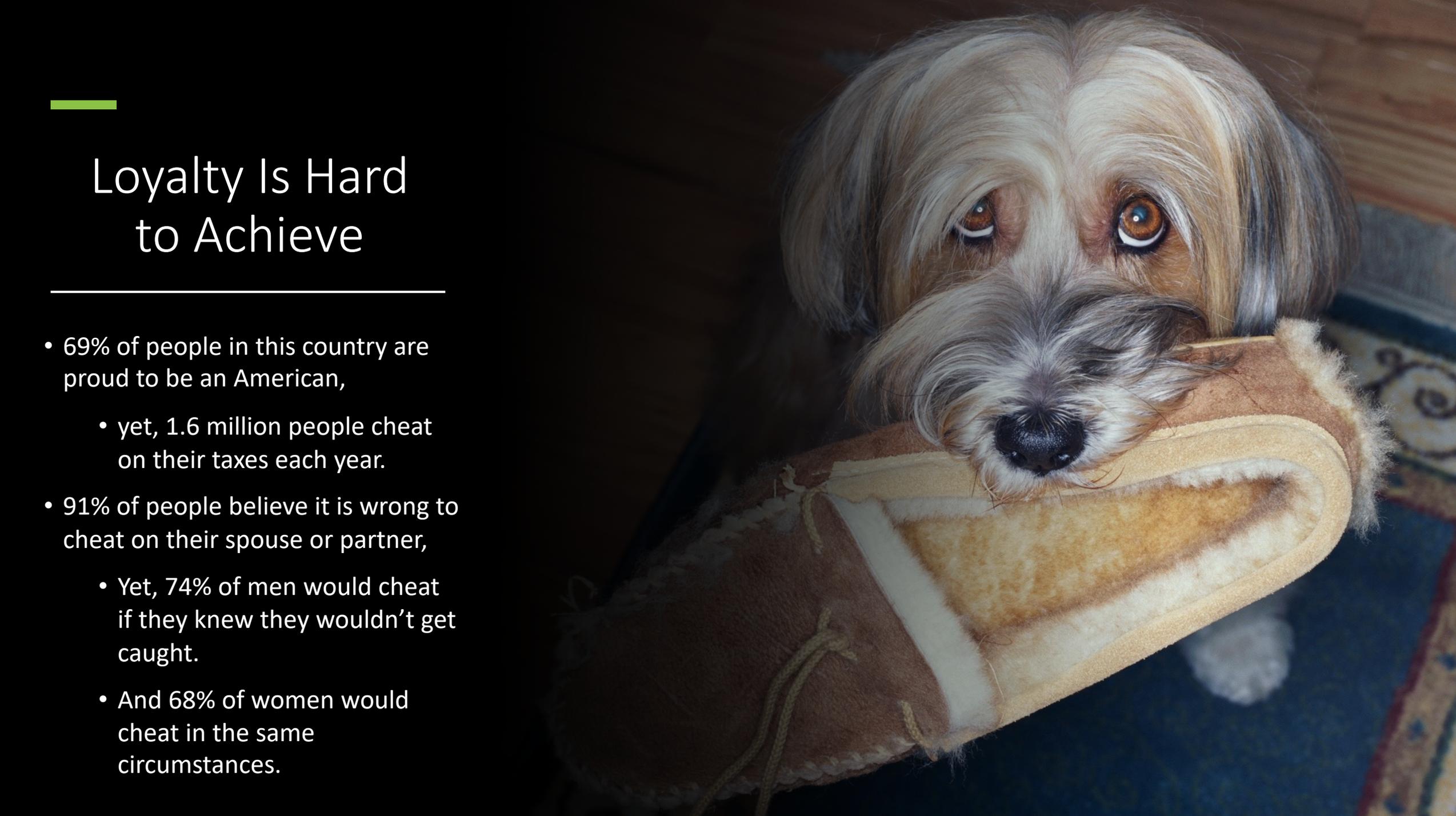
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SERVICE QUESTIONS?

The Client Journey - Loyalty



Loyalty Is Hard to Achieve

- 69% of people in this country are proud to be an American,
 - yet, 1.6 million people cheat on their taxes each year.
- 91% of people believe it is wrong to cheat on their spouse or partner,
 - Yet, 74% of men would cheat if they knew they wouldn't get caught.
 - And 68% of women would cheat in the same circumstances.

Accounting clients are loyal.... to a point

42%

of clients say they are 'somewhat' or 'very' likely to change primary firms in the next 12 months

54%

of clients are open to changing firms or actively looking

21%

of clients would 'likely' or 'definitely' leave your firm if their primary contact left.

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LOYALTY QUESTIONS?