

# Impact, not hours

## Value pricing questions to ask your clients


Your value to clients goes beyond the time it takes to answer a question or resolve an issue. Use this Client Interview Guide to determine what services clients need most and where they fit in your Good, Better, Best pricing plans.




### Pro-tip

Frame questions with a positive tone to avoid putting clients on the defensive. You are on the same team, tackling challenges and building solutions together.


## Welcome! To start, can you please describe your business and industry?

 **Follow up:** Build confidence by sharing your firm's experience within that industry, if applicable.


## What are your key financial goals this year? Are you planning for growth?

 **Follow up:** Repeat those goals in your own words to show you're listening and build trust. Offer an overview of your services that might support those goals.


## Tell us about your current accounting structure, the software or solution you're using, and the tasks and functions you'd like us to take off your plate.

 **Follow up:** Build confidence by letting the client know that repeatable tasks will be handled efficiently and accurately with state-of-the-art technology that will help them make better day-to-day operational decisions.


## What requires the most immediate attention in your business? (e.g., Are your tax filings current?)

 **Follow up:** If getting the books in order seems to be a budget concern, introduce the concept of value pricing, and assure the client that there will be no billing surprises—no matter how long it takes.

## Are there specific times of the year or points in your business cycle when you need the most support?

 **Follow up:** Here's another opportunity to offer peace of mind with value pricing—no billing surges at busy times. There's just one monthly/ annual fee, agreed upon upfront, based on the client's needs.

## What additional solutions or systems are you using? Is your data backing up automatically every night?

 **Follow up:** Listen for any solution gaps, then offer benefits-first insight. Your Good, Better, Best pricing model will allow the flexibility to find the best solution for their needs.

**"Talk about better processes, not about the platform."**

-Carla Caldwell, [Accounting Advisory webinar](#)

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## What would ideal communication between your team and ours look like for you?



**Follow up:** With value pricing you can offer plans that include all the services your clients need—including advisory—at one fixed price with no hourly limit. Encourage them to reach out for the expertise and guidance they want plus the bookkeeping basics they need.

## Do you or your team need training or ongoing support related to tools and reporting?



**Follow up:** Build the client relationship by describing the training and support your firm can include in their customized package. Let the client know that having your firm in their corner is like having an expert on staff.

## What challenges do you have with workforce management, if any?



**Follow up:** Let the client know that you have a wide range of high-value services to offer, and workforce management solutions are on the list. With automation in play, the client gets more for their money, and you do more with your time.

## What did you like most about your previous accountant? What could we do differently?



**Follow up:** Repeat those goals in your own words to show you're listening. Ensure the client that you'd like to grow this new advisory relationship while helping them to grow their business.

## Dig deeper with industry-specific questions

### Healthcare

- How do you maintain patient information, scheduling, and billing?
- Do you have data security challenges?

### Construction

- What pains do you face in bidding jobs and evaluating profitability?
- What are your job costing practices?

### Professional Services

- What type of service do you provide?
- Who are your typical clients?
- How long is an average project?
- What obstacles do you face in bidding jobs and evaluating profitability?

### Retail

- What products do you sell?
- How do you know what's selling well?
- How do you manage your inventory?
- Have you or do you want to explore e-commerce for your business?

### Nonprofits

- What are your sources of income?
- What financials do funders require for applications and reporting? How often?
- How do you stay current on wage and employment laws? IRS regulations for charitable giving?

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# Custom plan definition made easy. Take notes on client responses below.



## Good

What basic accounting work and reporting is the client asking for? What other services and deliverables are the client asking for?

## Better

In addition to above, what advisory areas will you add?

## Best

In addition to above, what else is part of your full expertise?

**Most**  
of your clients  
will land here<sup>1</sup>

Your clients want high-level conversation and data-driven guidance. **They want advisory.**

1. <https://hbr.org/2018/09/the-good-better-best-approach-to-pricing>