**Customer Relationship Management for Accounting Technicians**

Online software has allowed us to take on more clients compared to your average bookkeeper of five or ten years ago who looked after a limited number of clients and worked primarily at their premises. Now, we can competently service more clients, but the trick is to maintain personal connections with all those clients. You don’t need to have the same level of contact with all clients – spend time with those who expect and value insightful conversations but maintain professional communications with all clients, even if it is occasional.

The more clients you have, the more you need a system that can help you manage communications. How much unique client information is currently stored in your head? It will most likely be easier to have all that knowledge collected in one place for easy access and to ensure you don’t forget crucial information.

Customer relationship management (CRM) is not included in bookkeeping or accounting training! This is something you need to learn if you want to develop your own practice or build a business. Your role is all about providing professional services, and part of that is customer relationship management and communications skills.

**CRM Tools**

The reality is that to remain competitive as an accounting technician, you need to nurture your client relationships and use technology to make it easy and efficient. You can add value to your client communications without spending a fortune or taking days to set up a new system.

There are many excellent systems available for accounting technicians and BAS agents who wish to implement a system that will scale with their business over the long term.

Check out [Keap](https://keap.com/) for an established product with many features and excellent support. [Hubspot](https://www.hubspot.com/) is another well-regarded solution for businesses that need a full suite of customer relationship management services. [Capsule](https://capsulecrm.com/) is a simple solution targeted at small and start-up businesses.

Check out the AAT Tech Talk we did with [Karbon](https://www.youtube.com/watch?v=PR2rdZhjEm8), a platform that specialises in CRM for accountants and bookkeepers.

You could also look at the add-on products that integrate directly with your accounting software.

Don't be put off by the subscription prices of the products listed here. Many of the best CRM products offer free simplified versions if you are just starting in practice and only need minimal functions for one or two users.

**Systems and Service**

If you have not used a CRM system before, you will need to experiment to find a system you like to assist you without making your life more complex. The idea is to use technology to your advantage to offer professional service and communications to more clients.

Whatever system you choose should support you and make client administration easier, not more complex.

It will take some time to research and try the free versions, but once you have implemented a system, you will find you reap the benefits:

* Client data security
* Better understanding of your customer allows you to anticipate their needs
* Automated messaging
* Integrated client document and information management
* Follow-up reminders
* Systems that anyone in your team can use
* Useful reports and data analytics
* Scalable systems to offer more functions as your practice or business expands

Find a balance between using efficient systems to streamline your practice and offering meaningful and personalised service. Be clear about the unique value you offer clients beyond compliance advice and accounts management. Let’s not forget the real worth of what we provide to our clients with personal conversations and business insights.