TAXDOME

Client Satisfaction: What Taxpayers Expect from Their Accountants

1,000 Clients Share Exactly What They Want and Need from Firms

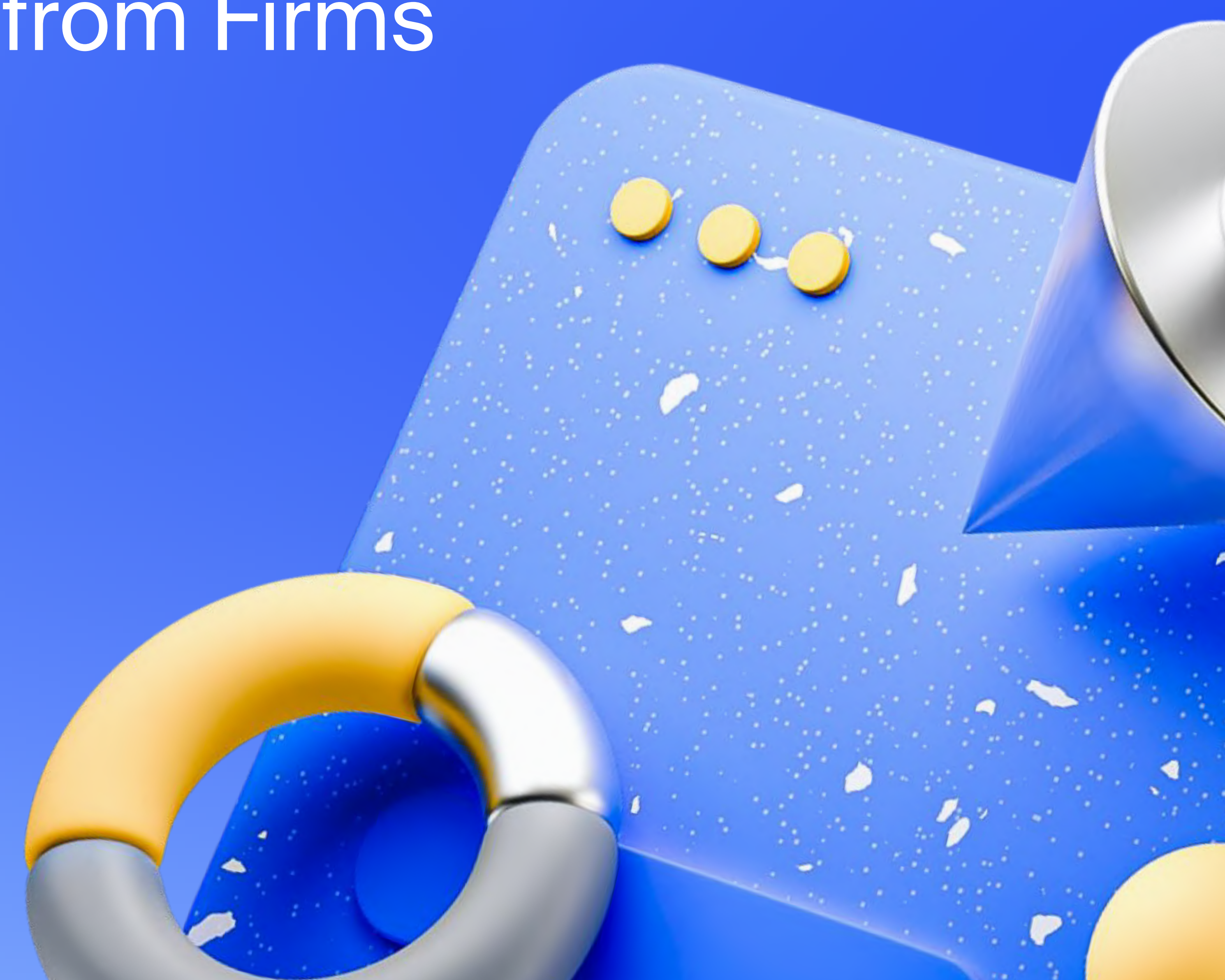


Table of Contents

Welcome to the 'Need to Know' of Accounting Client Satisfaction!

Hey there. Are you ready to supercharge your client relationships? You're in the right place. This report is your backstage pass to understanding exactly what your clients want—and how to keep them raving about your services. Spoiler alert: it's all about tech and trust.

No matter if you're a team of 100, a solo practitioner, an industry veteran, or new to the field—this report is designed for you. Here, you'll find essential insights to elevate your client relationships and grow your business.

Methodology: This is Not Your Typical Report!

Warning! This isn't just another cookie-cutter industry report. You know the kind—where they only ask professionals (in this case, accounting) what they think their clients want. At TaxDome, we did something bold: we worked with researcher Gina Slejko, Ph.D., Associate Professor of Marketing at Colorado State University and Consumer Insights Consultant, to go straight to the source and ask the clients themselves.

That's right! Instead of guessing or relying on third-party data, we surveyed 1,000 real people across the United States, 18 years or older, who have hired accountants and tax preparers. With a 95% confidence level and a 3.3% margin of error, you can trust these insights.

This report is packed with client-first data that you won't find anywhere else, asking clients directly what they expect from accounting professionals. The findings are game-changing—and they're backed by rigorous research.

Now, let's get into the juicy details.

Executive Introduction: The Client Satisfaction Revolution

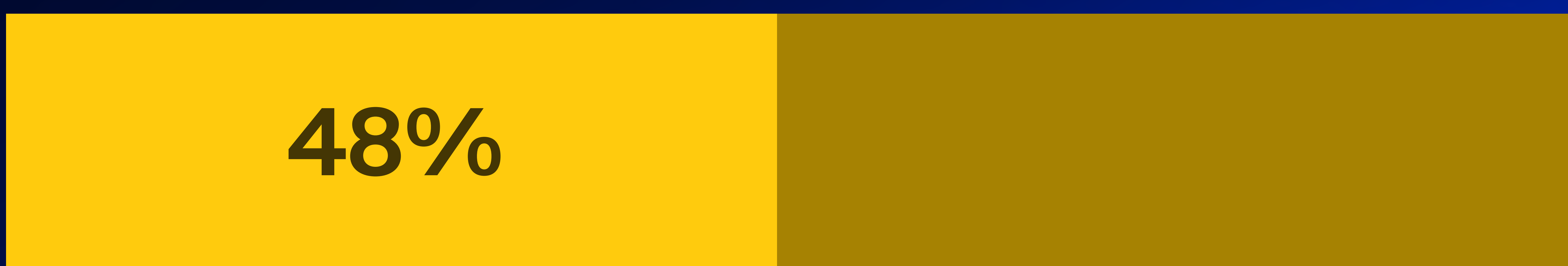
Ilya Radzinsky
Founder, TaxDome

"The accounting profession is evolving rapidly, driven by advancements in technology, changing regulations, and the shift from compliance to strategic advising. Amid these changes, one constant remains: client satisfaction is critical. To understand what truly matters to clients today, TaxDome went directly to the source, surveying taxpayers. Trust and reassurance are still priorities, but how accountants earn them has shifted—technology, security, and seamless communication are now key drivers.

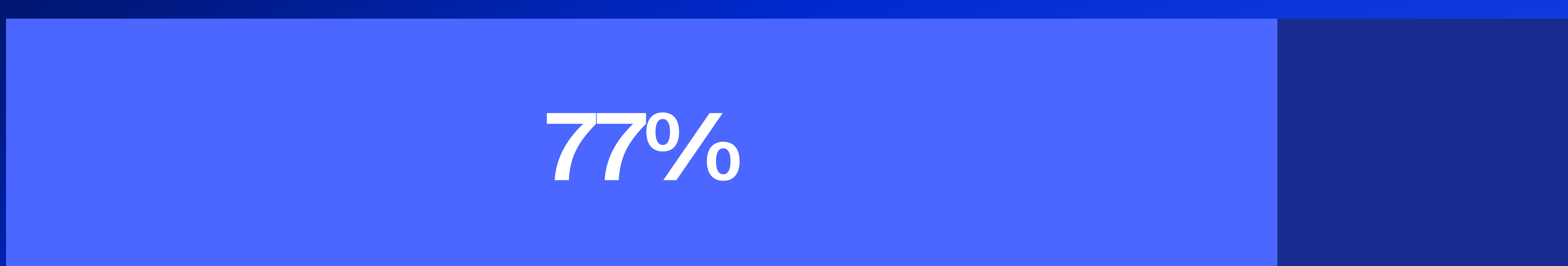
This report highlights what clients expect from their accountants in a fast-changing world and offers strategies to adapt and thrive. The message is clear: embrace innovation, prioritize the client experience, and leverage modern tools to stay ahead. By aligning with these expectations, you can turn client satisfaction into your competitive edge.

Why Technology is the Key to Client Satisfaction

Today, Trust is Built on Tech as Much as Service



48% of clients are fully satisfied with their accountant, but there's a catch. The accountants who are knocking it out of the park are the ones embracing technology.

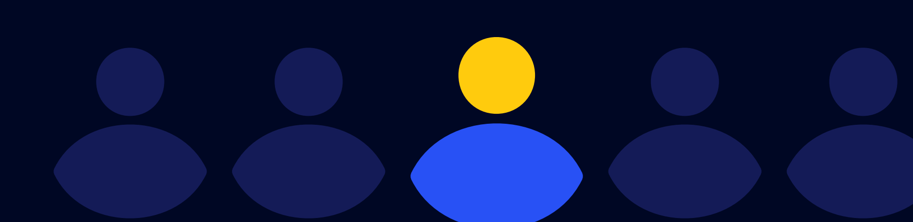


77% of those who say they were completely satisfied with their accountant report their accountants are innovative in their use of technology.

What does this mean for your firm? It's simple: Trust isn't just built through great service anymore. It's built through great tech. Clients want to know you're using the tools that make their lives easier and keep their data safe. And if you're able to deliver on these, data shows clients will not only be more satisfied with your work, but also ready to provide the information you need with a willingness to pay more for your services.

75%

of clients are willing to spend up to four hours providing information if the experience is seamless.



1 in 5 clients say they'd pay up to 50% extra for faster service.

💎 Takeaway:

Investing in technology is a win-win—you get happier clients, and they stick around for the long haul.

Building Trust in a Digital Age: The Non-Negotiables of Reassurance

The Non-Negotiables of Reassurance

It's time to shift your thinking.

Clients no longer see accountants through a transactional lens and as compliance-driven service providers. Data shows that clients now expect more. In today's fast-paced world, client experience is what sets accountants apart, and here's the kicker: technology plays a huge role in making that experience great.

It's not just about having tech—it's about how you use it.

Clients want to see that you're not only up-to-date with the latest tools but that these tools are easy for them to use and integrated into your workflow. Clients want secure web portals for easy document uploads, electronic document signing without the hassle, and real-time text updates.

Micro-assurances create macro trust.

Clients need to know their data is safe, their documents are handled securely, and they're getting real-time updates that keep them informed every step of the way. These micro-assurances—like instant notifications or secure document storage—are what create confidence and peace of mind.

Clients are ready: think seamless, secure, and simple.

The days of playing phone tag and mailing documents are over. Clients want and expect modern, secure portals. **Although 76% of respondents said their accountant should have used a secure web portal, only 44% said their accountant did.** Portals exist in all facets of life - HOAs, financial advisors, schools - If you're not offering a seamless experience, they're going to look for someone who does.

87% of clients want technological reassurance from their accountant.

Yes, you read that right—87%! Clients today expect secure, tech-powered service as a standard. It's no longer just about accuracy and deadlines—technology is the new way to build trust.

💎 Takeaway:

By 2025, providing this kind of reassurance isn't a nice-to-have—your clients - and potential clients - expect it. If you're not offering this level of tech-driven service, you're not just behind—you're out of the race.

The Modern Client Playbook: What Clients Are Saying and Demanding

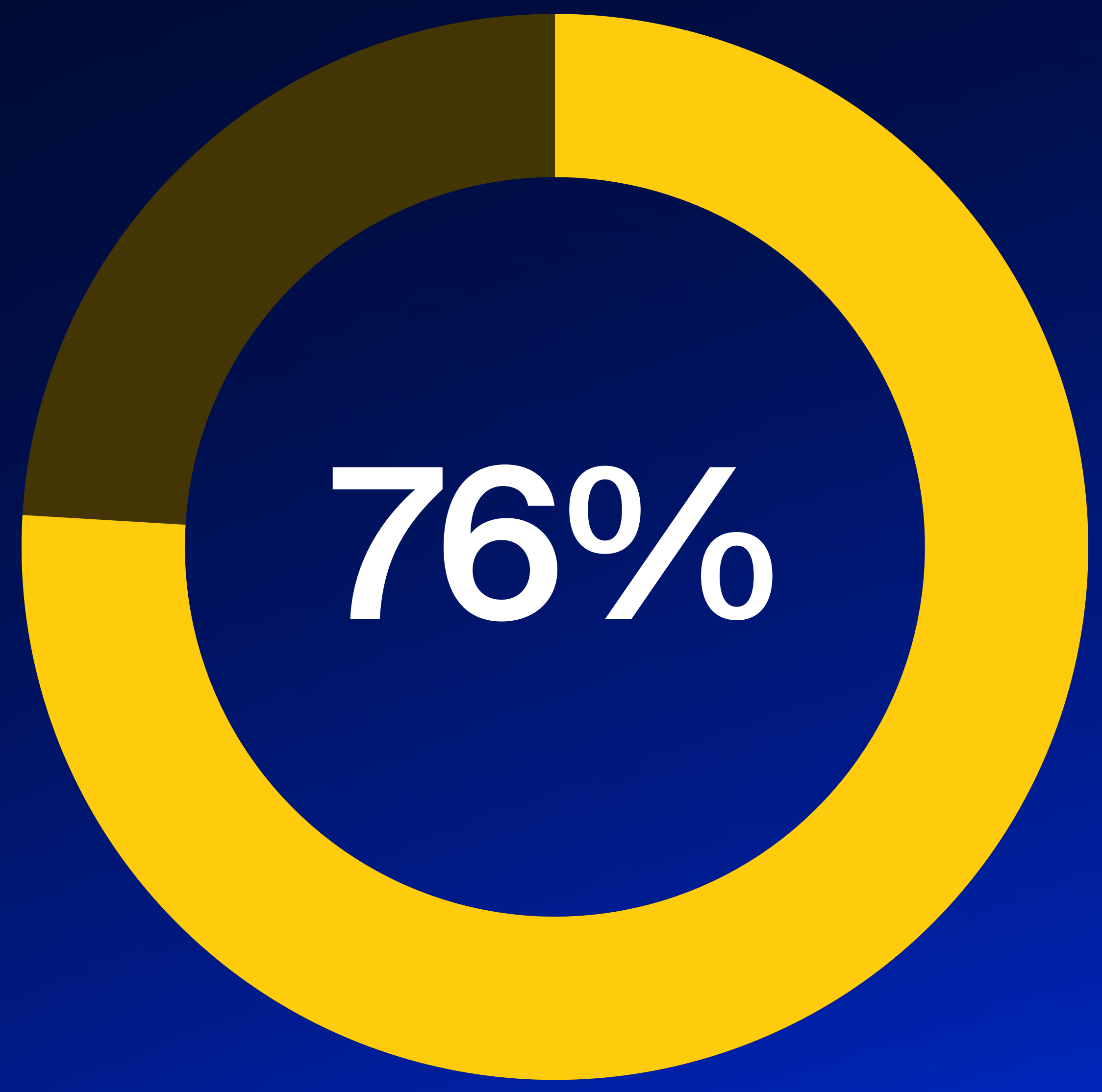
The Role of Technology in Client Satisfaction

Clients are increasingly comfortable with technology and now expect the same convenience in their accounting experience. They look to technology to make interactions with their accountant smoother, more efficient, and more accessible.

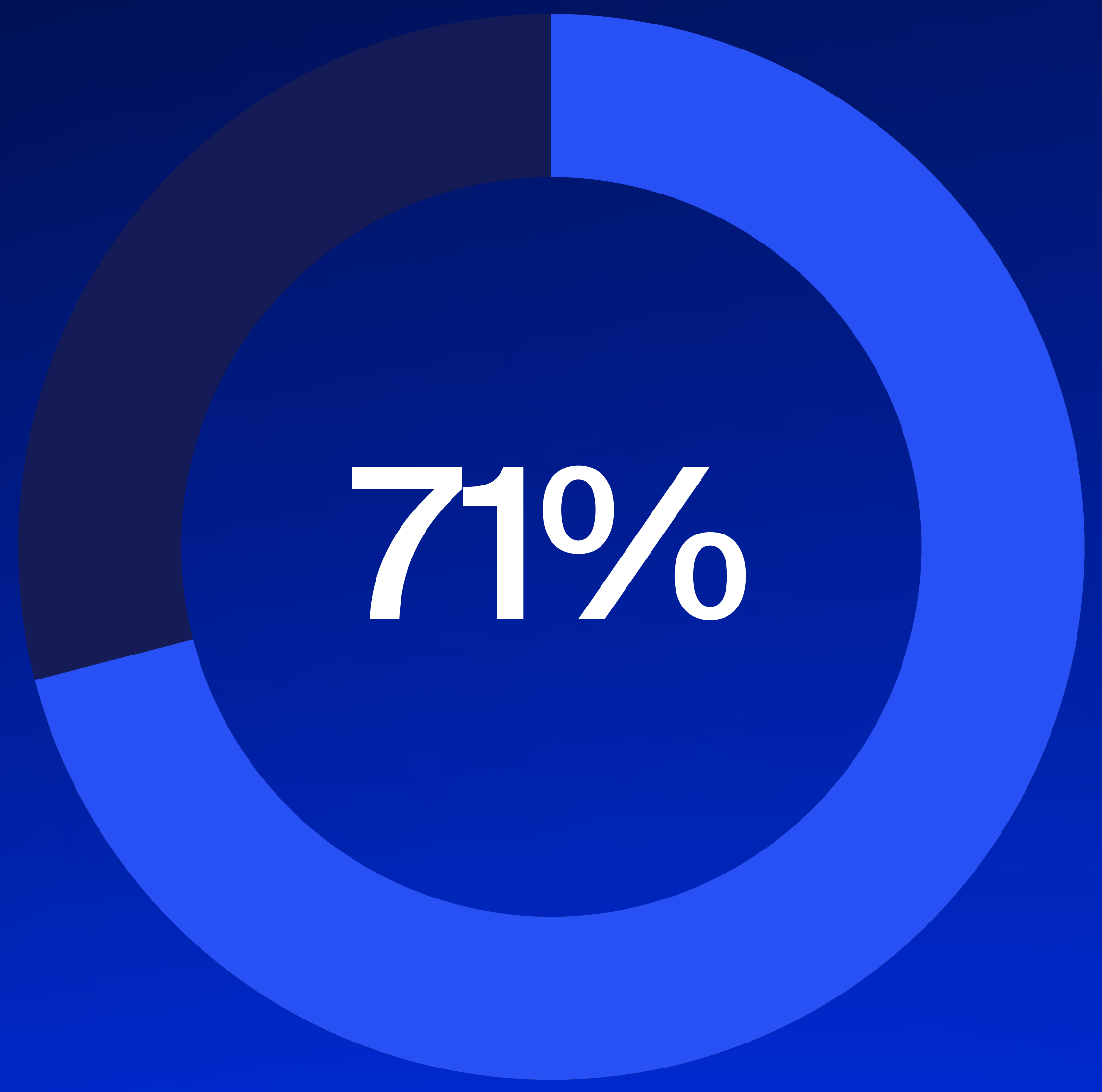
💎 Takeaway:

Technology transforms the client-accountant experience by streamlining workflows, improving communication, and providing real-time access to information. Tools like Loom enable quick video explanations, replacing lengthy meetings, while integrated platforms with secure portals and automated workflows keep clients informed and connected anytime, anywhere.

What clients are demanding:



say they would prefer to use a secure portal for communication and document exchange



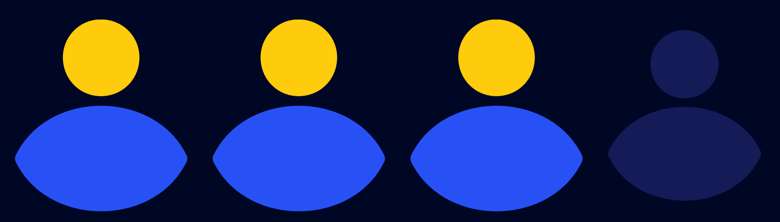
say it is very important that tasks they are asked to complete are provided to them digitally (i.e., digital checklists and workflows)

But only if the technology is easy to use:

79%

said easy-to-use digital tools are an important aspect of working with an accountant

And they want an all-in-one solution, not fragmented tools:



3 of 4

clients say they desire a single platform for all communications and document sharing

Data Security: Building Client Confidence

Data security is essential in accounting, with IRS guidelines and rising cyber threats making it a priority for both clients and practitioners. As clients grow accustomed to secure, modern applications, their expectations for security in accounting have also increased.

What clients are demanding:

77%

agree that any digital or electronic means of information-sharing with their accountant should include 2FA (two-factor authentication)

76%

want their accountant to provide proof that their data is kept securely

💎 Takeaway:

A secure web portal is a great start, but clients also expect added safeguards and clear proof that their data is protected. Ensure your portal is SOC2 certified and offers 2FA for complete peace of mind.

💡 Thought starter:

Clients have strong preferences for the right digital tools when sharing sensitive information. While only 27% find messaging apps suitable for sharing tax information, 76% prefer secure portals. Consider whether your current methods align with these preferences. How can you provide clients with the seamless, secure experience they expect?

Understanding Diverse Client Expectations

Our research revealed that clients fall into one of two distinct segments. Understanding these two groups is essential for delivering client satisfaction:

Client Segment	Segment Size (%)	Segment Description
"The Inspectors"	55%	This group is highly involved and detail-focused—"Inspectors" crave every number, update, and insight, expecting frequent updates and a secure, all-in-one solution. They value their accountant's expertise in preparing a quality deliverable and rely on tech-savvy, transparent communication to feel confident in the process. For this segment, keeping them informed at every step is key to high satisfaction.
"The Delegators"	45%	The "Delegators" are easygoing clients who are happy to let their accountant take the reins. For them, client satisfaction hinges on accuracy, efficiency, and minimal hassle. They prefer a hands-off experience, interacting only as necessary, but they still expect a high standard of security and assurance. Delegators want to know that everything is handled correctly and that their data is safe—without being overly involved.

💎 **Takeaway:**

The only way to achieve true client satisfaction is by tailoring a unique approach for each group, "Inspectors" and "Delegators"—and the right software can make creating these tailored experiences seamless and easy.

Thought Starters:

71%

want an onboarding experience

A solid onboarding experience is key: 71% of all clients want onboarding that explains how they'll work with you, including processes like document sharing. Ask yourself: Do you have a consistent, repeatable onboarding process and tools to make it seamless?

61%

expect and appreciate an intake form

And while intake forms can be a sticking point in the industry, 61% of all clients actually appreciate being asked for essential information upfront via questionnaires—it shows professionalism and thoroughness. Consider: How can you make intake forms simple and stress-free for clients, enhancing their experience from the start?

Proactive, Transparent Communication

While engagement styles vary, all clients value proactive communication. Timely updates and clear explanations are essential to increasing transparency and trust. In fact, technology significantly impacts this area: if firms aren't using digital tools, they may struggle to respond quickly, which clients notice.

Tax, bookkeeping and accounting professionals must ask themselves if their processes and tech can deliver the responsiveness clients demand.

What Clients Say Matters Most:

84%

want to be informed about last-minute changes

84%

value a personalized approach to their tax strategy

82%

want to see a clear order of steps to be followed

78%

want to be updated on their e-filing status

73%

want to understand why specific actions are being recommended

70%

want everyone involved in tax filing (e.g., partners or spouses) to be included in tax-related communications

💎 Takeaway:

Accounting firms that prioritize proactive communication build trust, enhance transparency, and improve client loyalty. Leveraging technology to provide seamless, personalized updates not only boosts satisfaction but also sets firms apart in a competitive landscape.

💡 Thought starter:

1 in 3 clients dislikes following up with their accountant. Ask yourself: what processes can you automate to keep clients informed and reassured? Proactively providing updates enhances the client experience and reduces unnecessary (and undesired) client outreach.

Clients today seek streamlined, secure access to essential information. A secure web portal delivers just that, making it easy to share documents, make payments, and communicate—meeting diverse client expectations efficiently. Only 46% of respondents said their accountant provided them with a secure web portal, while 76% noted they should have.

Secure, Streamlined Access via Web Portals is the Future

FROM:

Traditional, time-consuming methods of exchanging information, like email attachments or physical documents, which pose security risks.

TO:

Real-time, tech-enabled communication and collaboration tools to ensure the seamless flow of information between accountants and clients.

What Clients Want to Access in Their Client Portal:

- Documents
- Progress reports
- Notifications for updates
- Document signing
- Payments

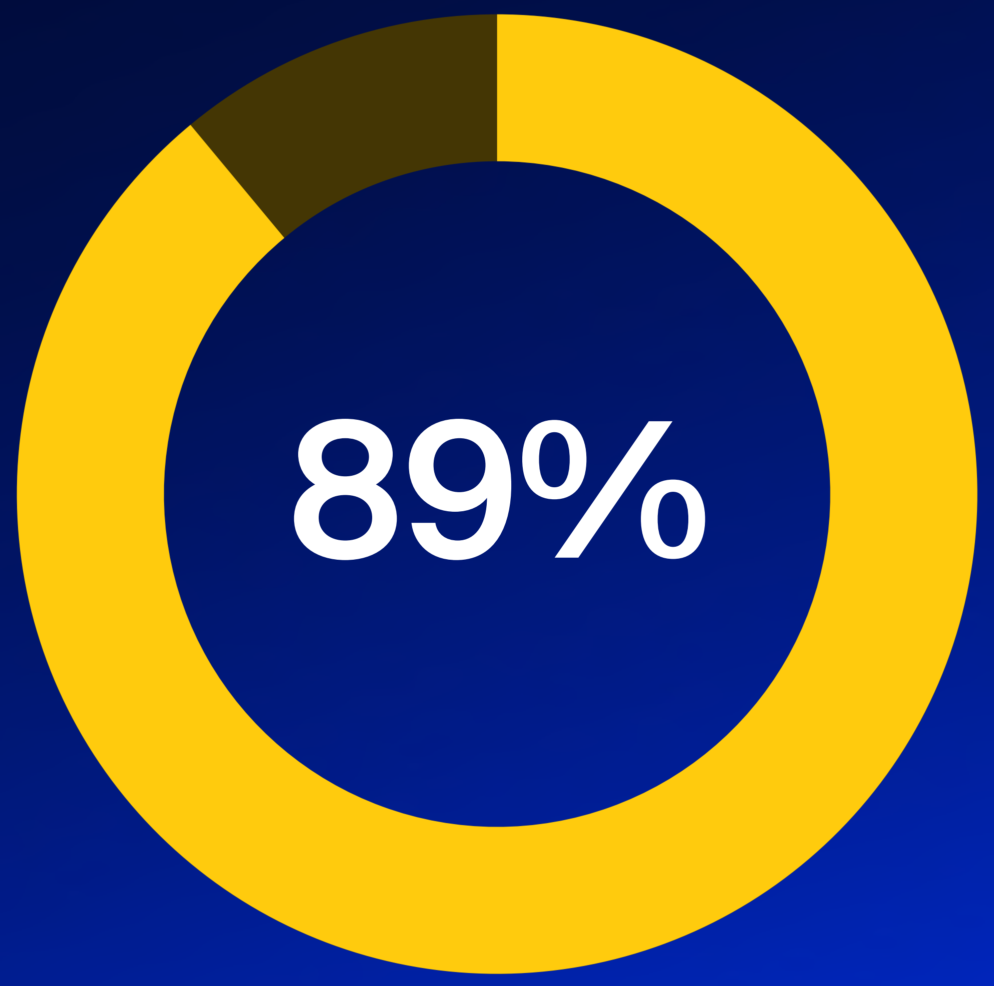
💎 Takeaway:

A secure, modern portal for data exchange boosts safety, efficiency, and client satisfaction. Offering secure portals for easy document uploads and virtual collaboration helps accountants meet today's client expectations and build stronger relationships.

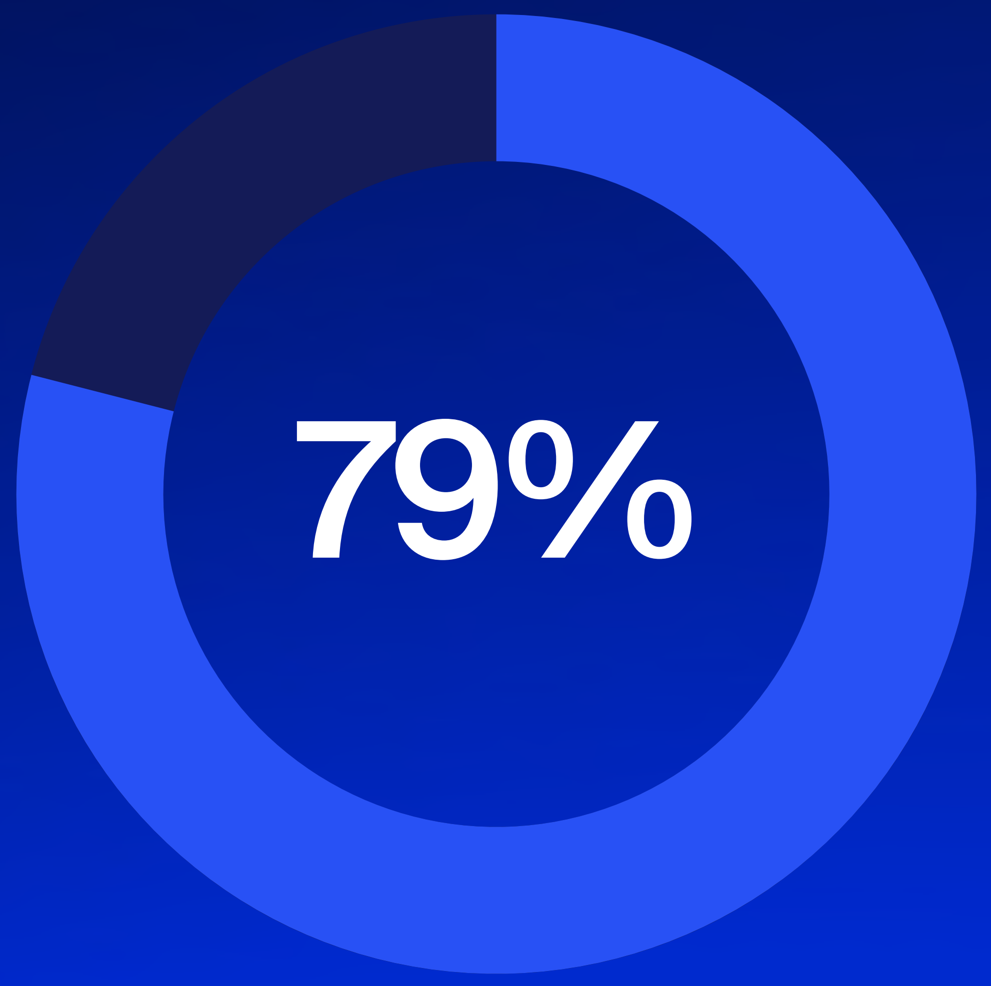
💡 Thought starter:

A web portal is just the beginning. 1 in every 2 clients say that the ability to conduct communication and document-sharing via mobile is important.

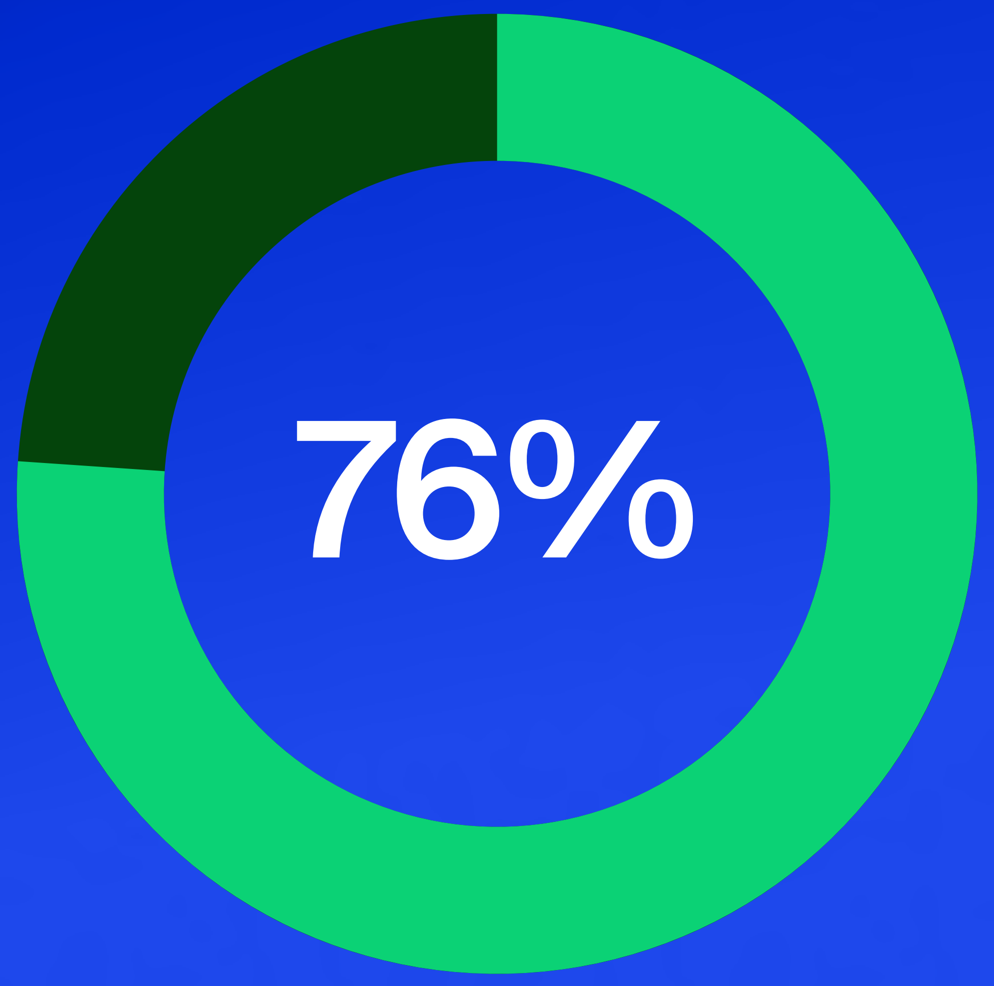
But, Clients Demand Web Portals Today



say they want assurances that their information is securely stored



agree that using a portal for document sharing, signatures, payments and messaging with their accountant is efficient

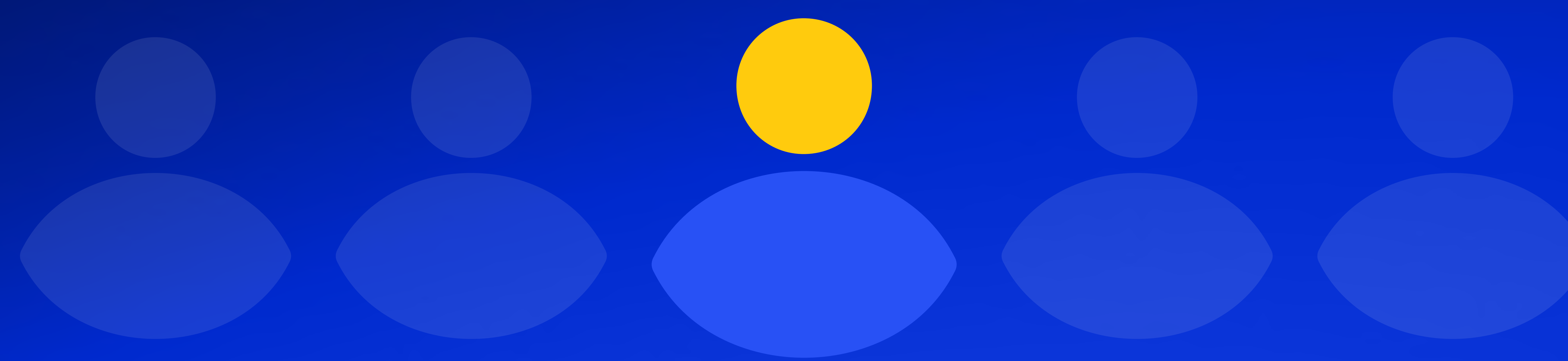


say they want to upload information via a secure portal

Delivering High-Value Service to Every Client

Today's clients are more demanding than ever—they expect fast, personalized, and seamless service that feels as if they're your top priority. Meeting these expectations requires more than traditional methods; it calls for technology-driven solutions that make interactions smooth, efficient, and responsive.

1 in 5 clients are ready to pay up to 50% more for faster turnaround times



💎 Takeaway:

By leveraging technology, accounting professionals can meet clients' high expectations for responsive, on-demand service. Tools like practice management software ensure that communication is faster, document sharing is easier, and payments are seamless, ultimately making clients feel valued and prioritized at every step.

💡 Thought starter:

Clients choose accountants for both practical benefits, like accuracy, and emotional ones, like reduced stress. Technology can help deliver precision and peace of mind seamlessly. Are you using it effectively to meet these needs and make clients feel secure and supported?

Where to Start Today: Practical Steps to Meet Client Expectations

We Recommend: Have a Plan & Pick a Starting Point

To meet these rising demands, professionals and firms need a focused, long-term plan that prioritizes the client experience across the board—from communication and secure information sharing to process improvements and seamless onboarding.

In our research, we asked clients what one change would make the biggest impact on their satisfaction with their accountant. Here's what they said:

Improve communication

But how?

- Proactive communication all year long
- Provide updates as work progresses
- Offer timely responses

Use secure and seamless technology

But how?

- Simple, user-friendly portals and apps
- Use one platform for document sharing, payments & communication

Offer faster service

But how?

- Offer rush-service options
- Avoid last-minute filings
- Faster responses to email communications

💎 Takeaway:

Start by implementing one item from this list, and set up a feedback loop to keep a pulse on client needs. It's a win-win: clients get the service they want, and you get direct insight into what matters most.

Client Expectations Are Only Growing. Are You Ready to Embrace Them?

Are you ready to elevate your client experience?

Explore how TaxDome can help your firm thrive in this new era.

Contact sales →

The way firms engage with their clients is transforming at an unprecedented pace. Technology is no longer just an option—it's the foundation for delivering the seamless, secure, and personalized experiences your clients now expect.

Since 2017, TaxDome has been at the forefront of this change, equipping 10,000+ firms across 25+ countries with a platform to enhance collaboration, streamline workflows and provide the experience your clients expect, the security they demand, and transparency they value. By embracing these innovations, you're not just keeping up—you're leading the way.

Winner of the 2024 Comprehensive Firm Workflow Solution Category in CPA Practice Advisor's Readers Choice Awards, TaxDome is the operating system for your practice™, ensuring your team is always one step ahead.

Thank You.