

Are you delivering a top client experience?

Tax, bookkeeping, and accounting firms are gaining a competitive edge by delivering an experience that today's clients want and expect. Take our quick quiz to see how your firm stacks up. Choose the most suitable answer for each question and total your score at the end.

1. Can clients complete every task (forms, uploads, signatures) digitally, without confusion?

- 1 - Tasks are mostly manual, requiring emails, printing, and back-and-forth.
- 2 - Some tasks are digital; the process is scattered and can be unclear.
- 3 - Every task is fully digital, quick, and easy for clients to complete.

2. Do you offer an easy-to-use client portal?

- 1 - No client portal.
- 2 - Portal is available, but some clients find it difficult or confusing.
- 3 - Portal is simple, intuitive, and user-friendly for all clients.

3. Is your portal secured with multi-factor authentication (MFA) and SOC 2 certification?

- 1 - Basic passwords only, no additional protection.
- 2 - Some parts have MFA or security measures.
- 3 - MFA and SOC 2-level security are standard for all clients.

4. Do you provide clients with real-time status updates without them having to ask?

- 1 - Clients often reach out to request updates.
- 2 - Some updates are provided, but not consistently.
- 3 - Clients automatically receive real-time status notifications.

5. Does all client communication and document exchange happen on one platform?

- 1 - Multiple tools are used; clients juggle different logins.
- 2 - Mostly on one platform, but some exceptions require other tools.
- 3 - Everything is managed through a single, unified platform.

6. How quickly does your firm respond to client questions or requests?

- 1 - Usually takes more than 48 hours.
- 2 - Typically within 24-48 hours.
- 3 - Always within 24 hours.

7. Can clients complete key tasks (pay, sign, upload, message) seamlessly from a mobile device?

- 1 - Tasks are difficult to complete on mobile, or mobile access is not supported.
- 2 - Portal offers mobile access, but not all tasks are fully supported.
- 3 - Fully mobile-friendly experience with a dedicated app.

8. Is your client onboarding process quick, easy, and sets clear expectations early?

- 1 - Onboarding often feels disorganized or overwhelming for clients.
- 2 - Some onboarding steps are clear, others are confusing for clients.
- 3 - Onboarding is fast, self-guided, and sets clear expectations.

9. Does your platform enhance (not hinder) your client experience?

- 1 - It often creates complexity or frustration for clients.
- 2 - Some tools and features help, others get in the way.
- 3 - The platform fully supports a seamless, client-first experience.

10. Do your clients say they feel secure, informed, supported, and happy?

- 1 - Rarely receive positive client feedback.
- 2 - Occasionally receive positive feedback.
- 3 - Consistently hear positive feedback and see it reflected in reviews.

How did your firm score?

28-30 points

You're delivering a world-class client experience. Your clients likely rave about your service and refer you often.

16-27 points

You're on the right track – refining a few areas can help turn good service into exceptional service.

15 points or fewer

Your client experience needs work. A better platform can get you there faster than you think.



Achieve a perfect 30/30 score with TaxDome

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