

Recording      Email      Handouts      Questions


### Agenda

1. What client resistance looks like
2. Obvious and more subtle signs of client resistance to new tech
3. Why some clients tend to be more resistant than others
4. 10+ ways you can help clients overcome resistance to new technology
5. Questions & Answers



### Are your clients resistant to technology?


- > "If it isn't broken, why fix it" attitude
- > Not everyone is quick to embrace change
- > Some clients may end up resisting the implementation of this new technology
- > However, your intention is to make their lives more convenient



### What does client tech resistance look like?


**They use a lot of traditional processes**

- > **Obvious signs:** Keeping lots of handwritten notebooks, submitting only paper receipts, only wanting to do meetings in-person and sign paperwork in-person
- > **Subtle signs:** Not having a website for their business, or not having a business-related email address.




**They're unresponsive to comms**

- > Don't respond to emails often
- > Not active on WhatsApp (but said they would be)
- > Only responding to phone calls and SMS




**Their mood changes**

- > Changes in attitude
- > Appears more grumpy or aloof when mentioning work that has to be done in new software




**They ignore notifications**

- > May feel software is unnecessary, too complicated, or not the right fit
- > Can block them from getting work done
- > Stems from aversion to change




**They hesitate to try out new tools**

- > Lack of confidence in themselves
- > Lack of trust in the software to get the job done
- > Could be dealt with through adequate training and support




**Frequently revert back to old ways**

- > Opting to use their old way of doing things instead of the new tool, despite receiving training or support
- > Likely that the client may be unused to the new technology and struggling to change
- > Remedy this with regular check ins and ways to incentivise them to use new software




**They don't give regular feedback**

- > Come across as apathetic
- > Refuse to share thoughts or concerns



**They feel a lack of support**

- > May feel unsupported in some way
- > Questions might not be adequately addressed
- > Might not have enough support to use the tool properly





### Why are some clients more resistant than others?




### They're not tech savvy

- New technology may seem intimidating to some clients, especially those who aren't as computer-savvy
- Not always dependent on age
- Recognise this resistance when it first appears
- Provide training, support and guidance as early as possible





### They have previous negative experiences


- It can affect how they communicate with their team and clients
- It can affect the time they put into a task, and the outcome of the task
- Perfectionism can backfire and lead to procrastination, missed deadlines, and substandard service.



### They enjoy the current software

- "If it's not broken, why fix it?" attitude
- This is an easier issue to tackle
- Show them how it's better than the system they're using





### They don't place the same value on it

- > This could be due to a very overwhelming onboarding experience
- > Might have been sold to them on the benefits it provides the accountant rather than the client
- > Avoid using phrases like "It saves me so much time" and "it reduces my overheads by this much"
- > Demonstrate the value that it brings to the client and their unique business needs




### 10+ tips to help clients embrace new technology




### 1. Understand the root of resistance

- > You can meet your clients where they're at
- > Pinpoint their struggles
- > Builds a foundation of empathy
- > Should help them relax and ease resistance a bit



### 2. Have an open conversation

- > Preferable face-to-face or over a video call
- > Be open to hearing their struggles
- > e.g. if you haven't been providing adequate support, step up and face it, rather than bouncing the blame back onto them



### 3. Put their concerns to rest

- Address in a practical and clear format
- e.g. if it's security concerns, explain measures the software takes to keep information safe
- Addressing concerns helps to build trust




### 4. Offer adequate training and support

- Look at the market rates for similar services
- Consider your firm's expenses and profitability goals
- Use this information to set a fair and profitable price for your services
- This takes the emotion out of pricing decisions and focuses on what is best for your firm and your clients



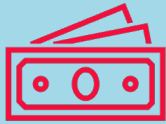
### 5. Communicate the benefits

- Avoidance is one of the biggest amplifiers for feelings of anxiety
- Taking risks can build your confidence and self-belief
- Helps you overcome that "I'm not good enough" and "I shouldn't be working here" voice in your head
- Also helps build the confidence needed to tackle unfamiliar challenges



### 6. Lead by example

- Have you sunk your teeth in the software?
- If not, how can you truly offer it to clients?
- If you can demonstrate how great it is, clients will be much more likely to believe it



## 7. Will there be ROI improvements?

- If it can provide financial benefit to the client, make sure that they're aware of it
- Use real-life examples from other clients who've found success from the product
- Make a comparative analysis between old and new software in terms of efficiency, profitability or productivity
- Look into other opportunities like improvements to data accuracy that can help them drive in more revenue



## 8. Produce guides

- Isn't an overnight process
- Takes time, effort and dedication
- Helps shift more towards learning and progress
- Implement office initiatives to overcome the imposter syndrome mindset – like an EAP, Teams channel to celebrate wins, etc.

## 8. Example of guide

### Addressing productivity barriers

There's that one obstacle that keeps you from getting things done. It's that pesky barrier that gets in the way of your productivity. It's that one thing that's always there, always getting in the way of your productivity. It's that one thing that's always there, always getting in the way of your productivity.

➤ **Identify the barrier**

The first barrier you may encounter will happen at the initial onboarding stage. When your client starts to learn the ropes of your software, they'll likely encounter a few common productivity barriers.

➤ **Address the barrier**

Once you've identified the barrier, the next step is to address it. There are a few ways to do this. You can provide a tutorial, a video, or a live session. You can also provide a checklist or a cheat sheet. The key is to provide your client with the resources they need to overcome the barrier.

### Smart tips

Identify the barriers that your clients are most likely to encounter. Provide them with the resources they need to overcome these barriers. Make sure your client knows that you're there to help them. Provide them with the resources they need to overcome these barriers.

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### User permissions

When you're setting up user permissions, it's important to make sure you're providing your clients with the resources they need to understand how to use the software. Provide them with the resources they need to understand how to use the software.

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### What are the benefits of Data Prepper?

- Simplifies data loading and cleaning
- Eliminates manual data entry
- Lowers cost when it comes to data management

### Data Prepper's processing power


- 99% accuracy
- 20 million rows per hour
- 20 million rows per hour
- 20 million rows per hour
- 20 million rows per hour
- 20 million rows per hour



## 9. Communication preferences and pricing

- When you're onboarding a client, ask what their communication preferences are
- Make sure you've got the set up required to accommodate them
- Ask them which devices they use too
- That way, you know if the tech you're offering is compatible with the devices that they use to run their businesses





### 10. Not appreciating the software's output

- > Might not appreciate software until they see the impact that it has on their business
- > e.g. software for cashflow forecasting
- > Their use of bookkeeping software will impact the accuracy of forecasting
- > Clients might not see value in the forecast until you deliver it to them (but if they haven't used the software correctly, it won't be worth anything)




### 11. Target the right clients

- > Want to position yourself as a digital practice that's using the cutting edge of tech?
- > Make sure you're positioning yourself in a way that attracts clients who align with this
- > Display this on your website
- > This should help avoid attracting clients that want to use traditional processes




### 12. Accept that change takes time

- > Rome wasn't built in a day, and neither will your clients' new perspectives.
- > Accept that changing client habits may take longer than you initially expected
- > Be patient with your clients as they come to grips with the change
- > Make sure the plan is gradual and takes place over weeks/months rather than days



### 13. At the end of the day, accept what is

- > We can't force technology on some clients
- > If they don't want it, you have to respect their choice
- > Provide them with the level of service they want
- > If not, then you'll risk losing them



### 14. Staff resistance to technology

- Overlaps a lot of reasons mentioned above
- Fear of job loss and lack of technical expertise are also possible causes
- Hold training sessions from software providers
- Reassure them that their job won't be lost
- Show them how it will make tasks easier and enhance work they're already doing

### Change is tough



Your responsibility to provide the best service



Understand clients' fears and put them to rest



Educate them thoroughly and exercise patience








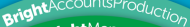


Transition clients to the path of less resistance

SESSION 6

MARKETING FOUNDATIONS:

## Marketing on a budget

24 JAN | 12 PM



**BrightAP**  
Accounts production software with a bookkeeping module that lets clients create invoices on-the-go


**BrightTax**  
Payroll software that makes managing payroll quick and easy. Available on Windows and cloud

**BrightManager**  
A cloud practice management solution that automates your admin and streamlines your task management

**BrightPropose**  
Proposal software that lets you create fully branded and professional proposals in just minutes

**BrightPay**  
Payroll software that makes managing payroll quick and easy. Available on Windows and cloud

**Questions & Answers**



The image shows a slide titled "Questions & Answers" with a blue and yellow logo in the top right corner. Below the title are three light blue square icons: the first shows a presentation screen with two people icons, the second shows a question mark inside a circle, and the third shows two overlapping speech bubbles.