

12 Ways to Make Your Tax Office More Inviting



By Charles E. McCabe

When was the last time you sat in your own client reception area? Note that we do not refer to it as a “waiting room”.

Never? Take a seat in there – or just think about it if you’re not at your office.

What’s it like? Is it bright and welcoming? Are there things to do?

When clients come in to have their taxes prepared, you want the entire experience to be pleasant – this includes time sitting in your reception area. While it’s true that no one likes to wait, making your clients more comfortable will help the wait not feel so long and enhance the overall experience.

Here are some ways you can make your office more inviting.

A friendly face that greets them immediately

Do you have a desk that faces the front door, ideally staffed by a friendly receptionist? No one wants to stand around wondering if anyone is going to immerge from a cubicle or a private office to greet them. If the receptionist is away from the desk, is there a bell to call for someone? There should be someone in sight to immediately acknowledge and assist all clients entering the office. If a receptionist is not feasible, your tax preparers should have a clear line of sight to the entrance door and be instructed to greet clients when they come in.

Up-to-date magazines

It’s nice to provide guests with magazines to read while they are waiting. but no one wants to read last year’s news. Make it a point to update your magazines throughout the tax season.

Cleanliness

The off-season is the time to give it a deep cleaning and replace torn chairs or worn out furniture. The overall look and feel of your office is important – it represents your business and how you operate. Plan to clean the office before clients start coming in and keep it clean and uncluttered throughout the entire tax season to maintain a professional image and operate efficiently

Tools to do the Job

Few thigs are more frustrating to your tax preparers and clients than trying to conduct the interview with out-of-date computers or inadequate tax software, website portal, CRM, internet access to tax research, and other equipment and supplies necessary to do the job professionally and efficiently.

Music

Music is great for ambiance and also helps cover the noise of typing, conversations, phone calls, etc. Contemporary soft music is often played in professional offices, but your clients might prefer something different, such as country, jazz, oldies, or soft rock. The type of music that is appropriate depends upon the types of clients you serve and where your tax office is located.

Office Decor

Wall art, such as great artist reproductions gives the office a classy look. However, prints of local

landmarks will convey your interest in and commitment to the community. Artificial plants add a nice touch at an affordable cost and they don't need watering! Although some tax pros may like to nurture live plants. Provide comfortable chairs; possibly even "Living Room" furniture.

Television

TV is a great way to make your clients' wait seem shorter – especially if they have children with them who need to be kept occupied. Consider a TV with a DVD player for kids entertainment.

Kid toys

Speaking of children... it's not uncommon for parents to have the kids with them when they come in. If you're a parent you know, sometimes it's just unavoidable. Having toys available for children to play with while they are in the office makes the experience much more pleasant because they have something to do. Consider crayons, puzzles, books and other quiet activities.

Beverages

Coffee is always a nice touch – whether it's a carafe up front or one of those single cup machines, consider offering coffee to guests when they arrive. A Keurig machine is an easy, cost-effective. option. You could also offer tea, water and/or soft drinks. Drinks can be offered to clients upon their arrival, but a drink station up front is a nice touch, so that clients can help themselves.

You might consider investing a couple of hundred dollars for an inexpensive beverage cooler.

Snacks

Want to go the extra mile? Offer snacks to guests. It doesn't cost that much and just adds an extra level of customer service. And you never know who's skipped lunch and will be unbelievably grateful for the snack! One Tax business owner I've heard from provides a popcorn machine, and another Tax pro bakes fresh cookies for her clients. Another option is Girl Scout cookies.

Privacy

Your client tax prep work stations should be as private as possible; either private offices or cubicles so that someone nearby cannot overhear the conversation. Clients are often divulging very personal and confidential details about their family matters, job status, sometimes divorce or negative job situations, etc. Having a private or semi-private work station to conduct the interview will be appreciated by clients and necessary for security.

Drop-off Service

Finally, if guests have items they need to drop off and don't need assistance, why make them wait for their preparer to finish up with a client or come to the front? Make it more convenient for them by offering a drop off service – either through your receptionist or another employee who can take in the client's documents. To ensure confidentiality, taxpayers' documents should not just be left on a desk or put into a drop-off box. An interview could be completed by phone and even Skype.

For more help with tax office policies, procedures and manuals, check out our [Tax Practice Management Tools](#) or our [Tax Business Articles](#).

LIKE WHAT YOU JUST READ?

Find More Great Tips in Our Blog:

<http://www.theincometaxschool.com/blog/>

Sign up for [RSS feeds](#)

Copyright, 2017, The Income Tax School, Inc., All Rights Reserved. This article may be reproduced or republished provided that the full attribution below "About the Author" and "About The Income Tax School" is included.

About the Author

Charles E. ("Chuck") McCabe, a 40+ year veteran tax industry executive, has managed hundreds of tax preparation offices. Chuck earned his B.S. degree in management from Adelphi University and Executive M.B.A. degree from Pace University. He is a national speaker, teacher and author on small business and tax practice management. Chuck is founder & CEO of Peoples Income Tax, Inc. and The Income Tax School, Inc. He has been included for multiple years in the Accounting Today Top 100 Most Influential People in Accounting. In addition, Chuck has written a book, published by ITS in 2017, titled: *Guide to Start and Grow Your Successful Tax Business*. Additional information may be obtained by calling Chuck at 1.800.984.1040, by emailing cmccabe@TheIncomeTaxSchool.com, or by visiting the ITS website www.TheIncomeTaxSchool.com.

About The Income Tax School

The Income Tax School is an IRS-Approved Continuing Education Provider. As the National Standard for Tax Education, ITS offers [online tax courses and CE seminars](#). ITS also offers tools to help ensure your success as a tax business owner, including [Tax Practice Management Manuals](#) and the book by Chuck McCabe, [Guide to Start and Grow Your Successful Tax Business](#). For more information, please visit us at www.TheIncomeTaxSchool.com.