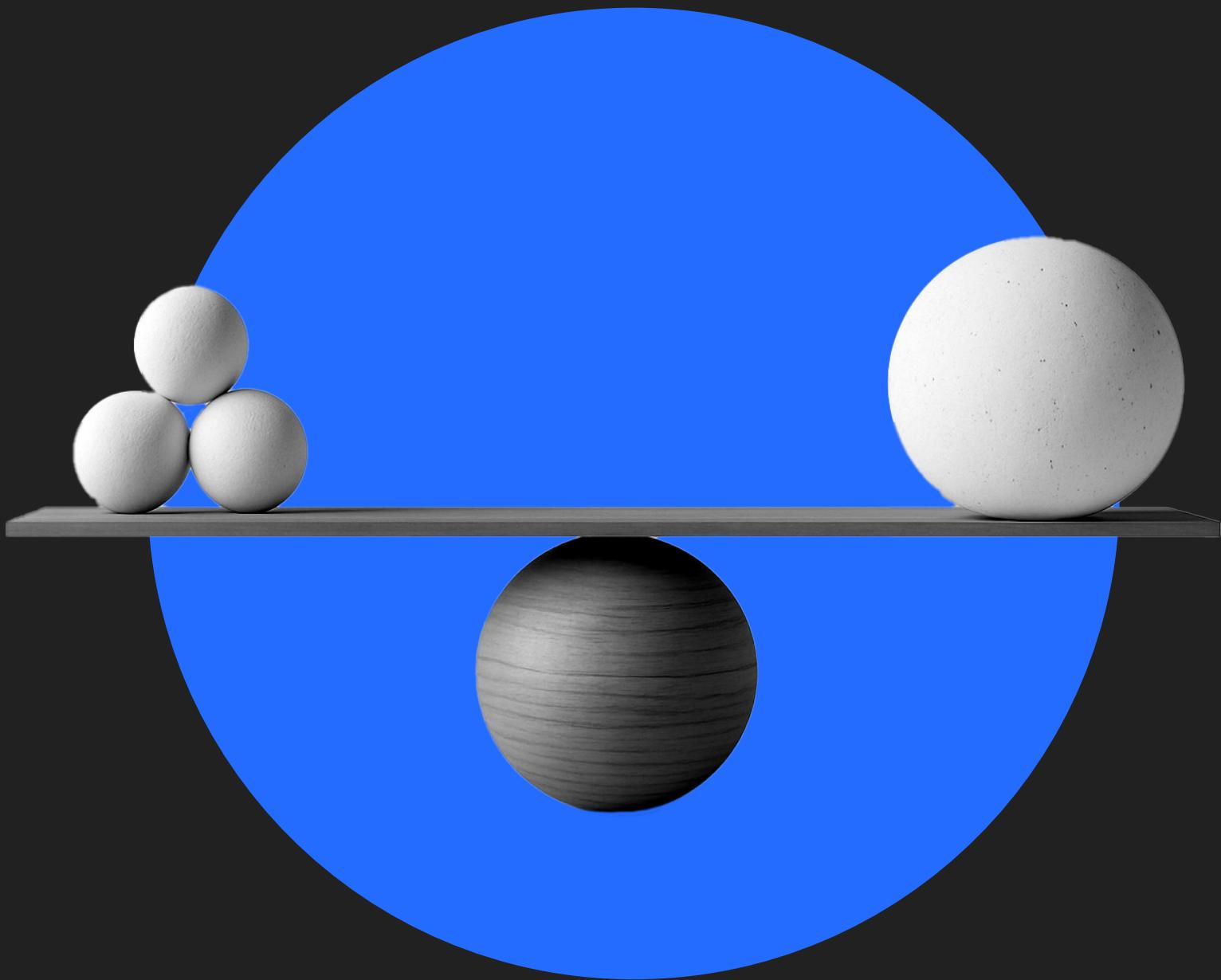


The Art of Subtraction



Scaling your firm by strategically
offboarding clients

INTUIT

The ambition to grow is a common thread running through the tax profession. Whether you're a solo practitioner aiming to build a small team, or a mid-sized firm pursuing market leadership, the desire to scale is a powerful motivator. But what if the most strategic path to growth isn't about addition, but subtraction?

Every time a firm grows, onboarding a new client is a process designed to make workflow and the relationship with the new client much smoother, but what about "offboarding" a client? How does that fit into firm growth?

Too often, firms fall into the trap of pursuing growth for growth's sake, resulting in a chaotic work environment and strained resources. The truly forward-thinking approach is to scale your firm your way. This means getting better and stronger, not just bigger. It involves building a practice that delivers exceptional value to a well-defined group of ideal clients.

This journey requires the courage to refine your client list, freeing up invaluable time and resources to focus on higher-value advisory work. But this raises a crucial question: What is the most strategic and professional way to transition clients who no longer fit your firm's evolving focus?

The crossroads of transition: Weighing your options

Once you've identified your firm's north star and defined your ideal client, you'll inevitably find that some clients fall outside that specialized focus. Handling this transition gracefully is critical. There are three common paths firms consider:

1. The sharp price increase

The logic is simple: if a client's work is less than ideal, charging a premium for it can either make the engagement profitable enough to justify or it will encourage the client to seek services elsewhere.

Pros: It's direct and can lead to higher revenue from the clients who choose to stay. It requires minimal effort to implement.

Cons: This approach can feel transactional and may damage the goodwill you've built over years. A higher price doesn't solve the underlying issue—your team is still performing non-specialized work that distracts from your core focus. It can also lead to awkward, value-based confrontations that many professionals prefer to avoid.

2. The direct referral to a peer firm

Connecting a client with another local or niche firm that is better suited to their needs seems like a professional and considerate option.

Pros: It preserves the relationship and shows you still care about the client's well-being. It can also build reciprocal goodwill with other firms in your network.

Cons: This path carries significant reputation risk. If the referred firm delivers a poor experience, that negative reflection can easily tarnish your reputation. Furthermore, you have to spend your own uncompensated time finding a peer with the right expertise, capacity, and service level, and there's no guarantee you'll find a perfect match.

3. The abrupt service discontinuation

In some cases, firms simply inform clients they can no longer serve them, a method often referred to as "firing" a client.

Pros: It is a swift and definitive way to free up capacity.

Cons: This is the most damaging option. It risks burning bridges, creating negative word-of-mouth in the community, and can leave a long-term client feeling abandoned and distressed. It's a last-resort tactic that should be avoided whenever possible.

A 4th path: Strategic, supported, and monetized offboarding

Each of the common paths presents a trade-off between professionalism, efficiency, and risk. However, there is a fourth path that mitigates these risks while creating a positive outcome for you and your client, a supported referral program.

Intuit's Client Referral Program is designed to provide a "trusted home" for clients transitioned from firms that are either refining their focus or for one of the reasons outlined above. It offers a strategic solution that directly addresses the shortcomings of the other options.

Confidently offload clients to vetted experts

A primary fear in referring clients is ensuring they receive the same level of service and trust they're used to. The Client Referral Program addresses this head-on. Clients are transitioned to qualified, credentialed tax experts with an average of more than 12 years of experience. Crucially, while it carries the TurboTax brand, the "Full Service" offering is unequivocally a human-expert-led service, not a DIY tool. This distinction is vital for setting proper client expectations and ensuring they receive professional, personalized care.

Eliminate your risk and ensure a seamless transition

Unlike a direct referral to a peer, this program is backed by a structured process and Intuit's guarantee. Intuit offers resources at every step; for example, Intuit provides client communication templates to ensure the handoff is smooth and professional. The program emphasizes transparency, allowing clients to be personally matched with experts based on their needs, fostering the trust required for a successful transition. This systematic approach protects your firm's reputation and legacy.

Monetize your client list and fuel your growth

Perhaps the most compelling advantage is financial. Instead of simply giving away a client relationship, the program allows you to monetize your years of hard work. You will earn 50% of the fee paid by the client in their first year with their new tax expert. This creates a new revenue stream from offboarded work, providing capital that can be reinvested into your firm's growth initiatives—whether that's marketing to more ideal clients or investing in new technology.

Building a better firm by design

Strategic scaling is intentional, requiring you to make thoughtful choices about where to focus your energy and expertise. Offboarding clients who no longer fit your niche isn't a sign of failure; it's a mark of strategic leadership and a critical step toward building a more profitable, resilient, and rewarding practice.

By leveraging a supported and monetized offboarding solution such as the Intuit Client Referral program, you can transition clients with confidence, protect your reputation, and unlock the resources needed to serve your ideal clients at the highest level. It's the smartest way to practice the art of subtraction, enabling your firm to achieve its most ambitious goals and secure its future.



Find out more
today about the

Intuit Client Referral Program

accountants.intuit.com/refer-clients