

## Ensuring Success 2024

### Session 3 Resources – Providing an Ideal Client Experience

Panelists: Michael Hsu, Enrico Palmerino, Terrell Turner

#### Webinars:

- CPA.com: [The Next Normal in Digital Client Experience](#)
- CPA Academy: [Unlocking the Connection Between Employee and Client Experiences](#)
- CPA Academy: [Elevate and Modernize your Client Experience](#)

#### Articles:

- Enrico Palmerino: [Providing an Ideal Client Experience – Is It Possible?](#)
- CPACHarge: [Understanding the Client Experience: An Intro for CPAs](#)
- Harvard Business Review: [Understanding Customer Experience](#)
- CPA Practice Advisor: [Client Experience for Today and Tomorrow – Ten Ideas for Your Playbook](#)

#### Whitepapers and other resources:

- Hanover Research: [The Power of Customer Journey Mapping](#)
- Technology & Services industry Association: [How to Use AI to Improve the Customer Experience](#)
- Content Square: [2025 Digital Customer Experience Trends](#)

#### Blogs:

- SmartVault Blog: [3 Tips to Improve the Client Experience and make This Year's New Clients Recurring Ones](#)
- Freshbooks Blog: [Build an Amazing Client Experience: 6 Great Accounting Customer Service Tips](#)
- Mango Practice Management Blog: [4 Ways Accounting Firms Can improve Client Experience](#)

#### Books:

- David Maister: [The Trusted Advisor](#)
- Rob Brown: [Delivering the Ultimate Client Experience: Less Stress, More Income, Greater Personal Freedom](#)
- Andrew Sobel: It Starts With Clients: [Your 100-Day Plan to Build Lifelong Relationships and Revenue](#)

#### Podcasts:

- Accounting Today featuring Sarah Dobek: [Building a Better Client Experience](#)
- CPA Trendlines featuring Mitch Reno: [Client Experience Advantage Goes to Small Firms|Gear Up for Growth](#)
- CPA Firm Management Association featuring Eric Gregg: [Harnessing the Client Experience for Accounting Firm Growth](#)