



5 proactive steps to boost firm performance

Being proactive is a cornerstone of continuous improvement. How can your firm nurture this mindset?



Introduction

People may view proactivity as a simple idea. Make a to-do list. Text a heads up. Ask for feedback. And let's get meta here—even reading a guide about being proactive is often seen as being proactive.

But, when proactivity is applied across an entire organization, it becomes more complex.

As one organizational behavior expert describes it:

“[Proactivity] is a unique, high-impact class of behaviors, comprising not familiar everyday actions but future-focused actions that create change by taking initiative, altering or forging new paths, persisting, and achieving new results.”¹



Exploring potential opportunities and challenges and making course corrections brings notable rewards, such as improved job performance, client service, problem-solving, and leadership.¹ It also builds a culture of continuous improvement, making it easier to see further down the road, navigate to intended results, and build new technology and advisory skills sets.

This guide offers 5 practical ways to build even more proactivity into firms, including data mining, developing skills, maximizing client connections, and more.

Contents

1. Pull in new perspectives
2. Support staff development
3. Prioritize technology
4. Infuse proactivity into client connections
5. Mine data

1

Pull in new perspectives

While you can't predict the future, you can tune into market and industry shifts to inform proactive measures. Doubtless, you're already familiar with your clients and their industries, which is invaluable in anticipating changes. However, considering perspectives from other experts and resources outside of your firm—like peers, analysts, and publications—can reinforce proactive prowess and surface new trends.





PRACTICAL ADVICE 01



Participate in groups and attend events that focus on your firm’s industry specializations. For example, the National Restaurant Association or the National Retail Federation may provide helpful information and data. The National Federation of Independent Businesses offers the same but with a focus on smaller businesses.

PRACTICAL ADVICE 02



Connect with your peers and accounting thought leaders. The accounting community is generous with sharing first-hand experiences, trends, and solutions. Attending accounting conferences, meetings facilitated by technology providers, and CPE sessions informs perspective.

PRACTICAL ADVICE 03



Follow analyst firms like Forrester, IDC, and Gartner to discover technology and industry trends and research based on C-suite perspectives.

PRACTICAL ADVICE 04



Stay in touch with business, national, state, and local news. Subscribe to newsletters, visit reputable social media feeds, and listen to podcasts.

2

Support staff development

A large part of being proactive is being prepared. Training and education help your staff upskill and stay ahead of the curve. The investment of time and resources will often find a quick ROI, as employees will have wider knowledge bases to help the firm and clients alike.





PRACTICAL ADVICE 01



Dedicate budget and time for education and document your firm’s professional development policy. These steps help staff understand your firm’s commitment. It also lays the groundwork for them to complete online courses and block focus time.

PRACTICAL ADVICE 02



Encourage technology certifications. Team members who are [certified](#) are generally more confident with the solution—meaning they can often address issues independently of technical support, optimize the solutions for efficiency, and better help clients with questions.

PRACTICAL ADVICE 03



Work with staff to map areas of opportunity for training. For example, if your firm wants to launch client advisory services (CAS), ongoing education [\(like these workshops offered by CPA.com\)](#) helps employees upskill. If your firm is interested in accelerating growth, [masterclasses led by industry experts](#) can prime employees to support the initiative.

PRACTICAL ADVICE 04

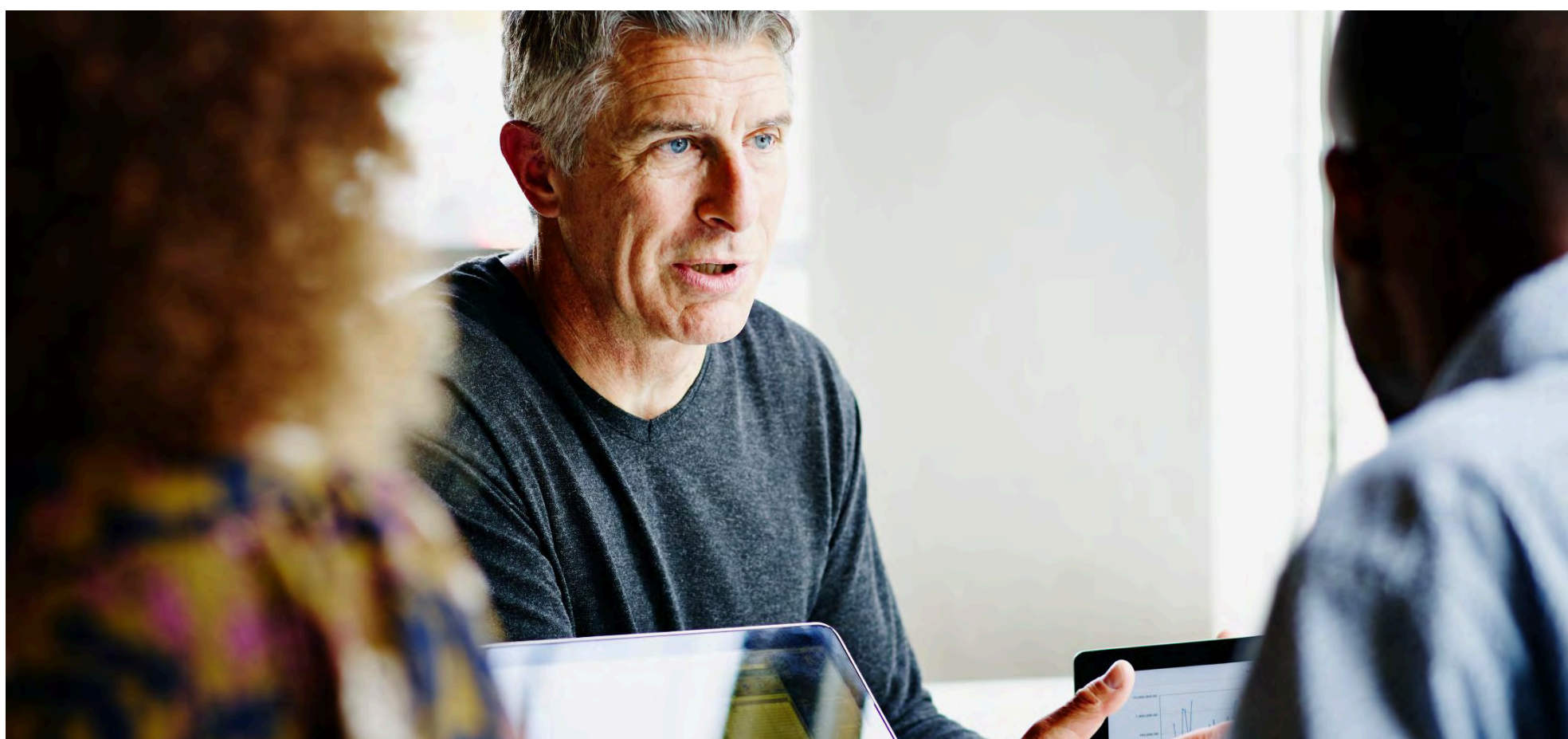


Be sure to celebrate wins like new technology certifications, course completions, and educational milestones.

3

Prioritize technology

Technology fuels proactivity on many levels. It creates efficiencies that give your firm more time to focus on higher-value contributions. For example, surveyed BILL customers report saving, on average, 50% of time on accounts payable.² It also offers AI and real-time data, enabling more effective cash flow management and financial planning.





PRACTICAL ADVICE 01



Leverage your technology provider relationships strategically. Have regular meetings with account managers to get advice on how to roll out, train, and optimize solutions. Attend user conferences to learn more about the technology and how other firms use it. You can also join your tech providers' advisory councils to help shape roadmaps.

PRACTICAL ADVICE 02



Ensure you're using your tech stack to its fullest potential. Are there helpful features your firm is overlooking? Or new solutions offered by your tech provider that your firm can benefit from?

PRACTICAL ADVICE 03



Lean on AI. Its predictive nature supports proactive thinking and it is often already built into leading accounting technologies. For example, AI can detect duplicate invoices and [predict when bills are missing](#). Finding errors before they impact cash flow is valuable for clients.

PRACTICAL ADVICE 04



Inform advisory-level services with real-time spend data. For context, [spend management technology](#) gives you real-time visibility into your client's cash flow. You can advise them on immediate adjustments, before any cash is spent, and use integrated charge cards to enforce budgets.

4

Infuse proactivity into client connections

Client touchpoints are great targets for proactive measures. You likely have recurring meetings set with your clients and scheduled communications in place like emails or newsletters. Be sure to document client notes (for example, in a CRM system) so that any feedback is addressed, other staff members are aware of it, and you have that information for future review and planning.





PRACTICAL ADVICE 01



Train staff to identify pain points in client meetings and discuss how your firm can help. This may be refining a process, offering a new service or technology, or simply referring a client to a trusted business partner for non-accounting issues.

PRACTICAL ADVICE 02



Survey your clients. Start by measuring customer loyalty with your firm's [NetPromoter Score](#). Clients who are categorized as promoters have a lifetime value that is 600%-1,400% higher than those who are not.³ Surveys can also help you fine-tune. For example, surveying clients about their onboarding experience can reveal areas where your firm might want to adjust or overlooked opportunities.

PRACTICAL ADVICE 03



Leverage collective (and anonymized) benchmarks, based on business sizes, industries, and more. If a client is underperforming relative to the benchmarks, you can work together to improve. Likewise, if a set of clients are excelling, your firm can look for common areas that might inform best practices.

PRACTICAL ADVICE 04



Ask clients about upcoming priorities and initiatives to discover new ways to support their businesses.

5

Mine data

Data analysis is an ideal complement for proactive thinking, as it often reveals recurring patterns and areas of interest. The good news is that your firm doesn't need yottabytes of data to benefit analysis. And the results can inform your firm's plans in key areas like growth, client retention, talent strategy, and more.





PRACTICAL ADVICE 01



Analyze survey data. If you have client and employee survey data, review the responses. Are there recurring patterns or themes that arise? Should any of those be examined further? Many online survey providers offer tools to make deploying surveys and analyzing results quicker and easier.

PRACTICAL ADVICE 02



Start with historical, existing data in areas such as finances, operations, human resources, marketing, sales, and more. Audit for additional pools of data that may inform KPIs, initiatives, or planning. Technology solutions your firm uses are a good starting point, thanks to reporting features and integrations.

PRACTICAL ADVICE 03



Contextualize data with employee feedback. Are there data points that are contrary or unexpected? It's helpful to talk with employees for more insight.

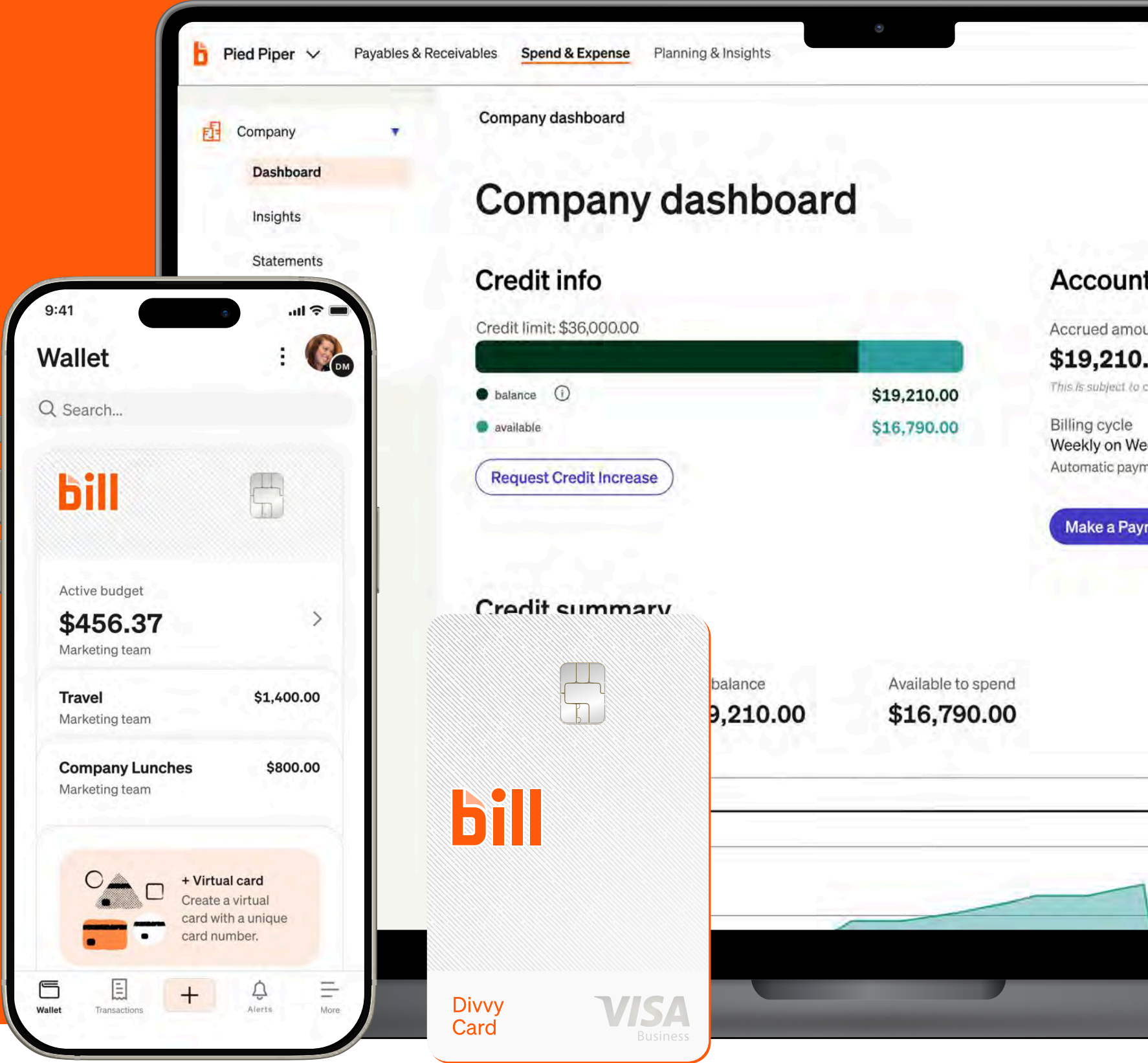
PRACTICAL ADVICE 04



Move past spreadsheets when possible. For example, financial planning and analysis automation enables flexible scenario planning and forecasting that can inform timely, strategic decisions.

Ready to help your clients spend smarter?

Reach out to your account manager today or visit bill.com/for-accountants



¹ Mastering Self-Command, Psychology Today
² Based on a 2021 survey of over 2,000 BILL customers.
³ [Companies that offer a winning customer experience grow faster and develop loyal followings.](#)

This guide does not, and is not intended to constitute legal or financial advice and is for general informational purposes only. The content is provided "as-is"; no representations are made that the content is error free.

©2025 Bill.com, LLC. BILL, the BILL logo, Bill.com, the Bill.com logo, and the "b" logo are trademarks of Bill.com, LLC. All other company names and brands are the property of their respective owners. The BILL Divvy Card may be issued by one of Divvy Pay, LLC's [bank partners](#). The BILL Divvy Card is not a deposit product. For your specific lender, see your Card Agreement. 26937-4680-3669

