

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

BUSINESS MANAGEMENT

How to Improve Client Communications by Channeling Your Messages

Doug Sleeter • Sep. 05, 2014



Column: Successful Small Business Consulting

One of the most important skills consultants must perfect is the way in which we communicate with others. When someone cannot communicate clearly or efficiently, that person loses the respect and trust of clients, coworkers, bosses, and really everyone around them. So since your success relies so heavily on trust and respect, your communication skills must always improve and evolve to be appropriate, effective and efficient.

One thing that accountants and consultants are good at is *processes*. And a key aspect of communicating effectively is to be really good at the *process* of communicating.

We send and receive messages (written and verbal) between our clients, coworkers, family and friends in so many different ways that it's mind-boggling to keep up with all the messages coming and going. In a June, 2010 study done by Plantronics, the world leader in personal audio communications (you probably own a Plantronics headset), 78 percent of professionals reported that their email usage "had dramatically increased over the past five years." That's no surprise, but in addition to the huge increase in email volume, we're also getting bombarded with more and more communication technologies that increase our availability ... and reach to the rest of the world.

Messaging technologies have developed so fast over the past few years that it's hard to keep up. The most common forms include text messaging, Facebook, LinkedIn, Twitter, instant messages, online forums, and yes, even the telephone. But the telephone is really becoming an old-world way of communicating. If you have children, you probably know that the telephone conversation is definitely on the way out. The accepted way of communicating is moving quickly towards text messaging and other forms of social media such as Facebook and Twitter. And like many technology developments, you can try to opt out or at least delay adopting these new gadgets and communication tools, but eventually you'll need to join in or you'll most certainly find yourself "out of the loop" in the new business world.

For the most part, these new communication tools are great and they serve their purpose. But at the same time, the new tools bring a need to scrutinize how we manage our communication processes.

Think back to the last tax season and consider how well (or not) you managed the *processes* of communicating with your clients and coworkers. Think about all the messages you sent and received and about how efficient or inefficient the process

became. Did your processes improve or undermine success? If most of your outbound messaging was via email, my bet is that you were swamped with incoming email, and while much of it was efficient, there were probably several ancillary inefficient communications that were actually caused by the fact that you used email.

Since most of our business messages are delivered via email, it's worth asking, "What's good and what's NOT good about email?" The good thing about email is that it allows an unlimited length message to be sent directly between the sender and one or more people. It allows anyone at any level of an organization to communicate directly with anyone else inside or outside the firm, and it virtually eliminates the possibility of messages getting filtered by bosses or anyone else.

But email has problems, and the problems are growing. The biggest problem is the sheer quantity of emails that are being dumped into our inboxes every day. And we have no way of controlling the quantity or quality of those messages, so we're all becoming a slave to our inboxes. This growing problem is one of the reasons we're seeing such great success with tools like Twitter, Facebook and LinkedIn. Email is an incredible tool, and because of that it also has incredible potential for misuse. Spam is the most obvious misuse; and I don't know about you, but no matter how many spam filters I use, I'm still receiving far too many unsolicited emails. Another big problem with email is that it has an incredible potential for creating misunderstandings and even ruining relationships, all because it has no "tone." The Plantronics study revealed that half of those polled "said that a misunderstood email message 'caused tension' in a relationship." I think the other 50 percent just haven't dealt with an unintelligible email yet, because in my experience, nearly everyone has had some type of tension caused by a misunderstanding stemming from a poorly written email.

By "channeling" our messaging activities with these tools, we can start to stem the tide of the ever-growing inbox. Here are a few examples of how you can use tools other than email to channel your communications and streamline your communication processes:

Facebook: Nearly all of your correspondence with family/friends can now be done with Facebook, and by moving all of your family/friends communication to Facebook, you'll probably greatly enhance the quality of your messages with your family. With all the status updates, pictures, picture tagging, one-to-one as well as one-to-many messaging, Facebook is a really great tool, and it can greatly reduce your email inbox clutter.

Forums: Forums are a great tool to communicate with large groups of people with similar interests. With the over 600 consultants in The Sleeter Group network, our Yahoo! Group forum is the most efficient way for members to communicate with each other. We also have local Meetup groups across the country, and scheduling meetings and managing invitations and RSVPs are all done with the Meetup.com website tools.

LinkedIn: When I want to reach out to my network of business connections, I can quickly get to them using LinkedIn. LinkedIn also has Forums that some feel are superior to the Yahoo! Groups.

Twitter: Sometimes you just want to broadcast a short message and have thousands of people see it instantly. Twitter is a great tool for that. Not only can you reach broad audiences, but you can also read the latest news flashes from a broad spectrum of people or groups you want to “follow” on Twitter.

Instant Messaging: At our company, the staff lives on IM. We use IM very carefully, but for those short messages like “Sherrill’s on line 1” or “the server is down,” IMs are a great resource.

Telephone: Oh yeah, what about the good old telephone call? So many of us have gotten so out of the habit of using the phone that it’s become somewhat of a foreign concept to consider just calling instead of sending an email. But the phone is still a *very* valuable tool, and I think we all need to consider using it more. So many misunderstandings caused by poorly written email could get resolved or be prevented altogether if someone would just pick up the phone.

With all of these new technologies, it’s a bit daunting to wade through it all and decide which tools you’ll use, and exactly how each will contribute to your overall effectiveness. But it’s time well spent to think through your processes and update your tools to make sure you’re remaining ahead of the curve. As a leader and successful consultant, you must stay in touch with how your current and future clients will want to work with you. Once you get to a place where you’ve compartmentalized your messaging into the channels discussed here, you’ll be on the road to streamlined, happy client relationships. In a future column, I’ll continue this thread by discussing how “collaborative” efforts start with channeling your messaging in meaningful, useful ways.

Oh, I almost forgot to say: Don’t forget about those in-person meetings! All of these technologies are just assistants to us, and will NEVER replace the value of the

occasional face-to-face, in-person meeting. On that note, I hope to see you all, *in person*, at our 2011 Accounting Solutions Conference in Las Vegas, November 7-9, 2011 (www.sleeterconference.com).

The Sleeter Group • Business Management • Consulting Services • Contact Management • Customer Relationship Management • E-Mail Management • Portals • Practice Management • Product & Service Guide • Resources, Supplies & Services • Technology • Workflow • Article • Facebook • Twitter

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2022 Firmworks, LLC. All rights reserved