## **CPA**

## Practice **Advisor**

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## **COMMUNICATIONS**

Imagine what it would be like if some of your routine administrative tasks were handled without ever lifting a finger.

May. 05, 2015



Imagine what it would be like if some of your routine administrative tasks were handled without ever lifting a finger? Now not every routine task can be handled automatically, but certain date-driven recurring tasks can.

## What is Date-driven Communication?

Accountants and tax preparers, by the very nature of their work, are date-driven. For

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With online date-driven communication tools, setting these client messages up to be sent out automatically results in a 'set it and forget it' notification system. Partners are not required to invest any time managing this administrative task after it has been set up. A date-driven communication system ensures automated, accurate and timely delivery of standard messages. Administrative-type tasks are important, but when they can be automated, they become easy and reliable.

There are many reasons why date-driven communications make common sense. Here are six solid reasons why:

- 1. Small business owners prefer you to handle their bookkeeping, banking and finance work, and they expect you to be timely about it.
- 2. Accountant and bookkeeper work is largely date-driven; it's usually cyclical.
- 3. 'Set it and forget it' makes date-driven routine communication easy to manage.
- 4. Partners' time is more wisely spent on value-added billable work.
- 5. Keeping clients systematically informed helps to ensure they deliver what is needed on a timely basis; this keeps work moving through the practice.
- 6. Consistently keeping your practice in front of your clients reinforces your brand and your relationship with them.

In recent years many, online date-driven client communication tools have been designed to handle many of your routine tasks, freeing up anywhere from five minutes to an hour a day, time you could spend doing something else.

Here is a question to ponder and comment upon below. We would love to hear from you:

• What would you do with this new-found free time?

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