CPA

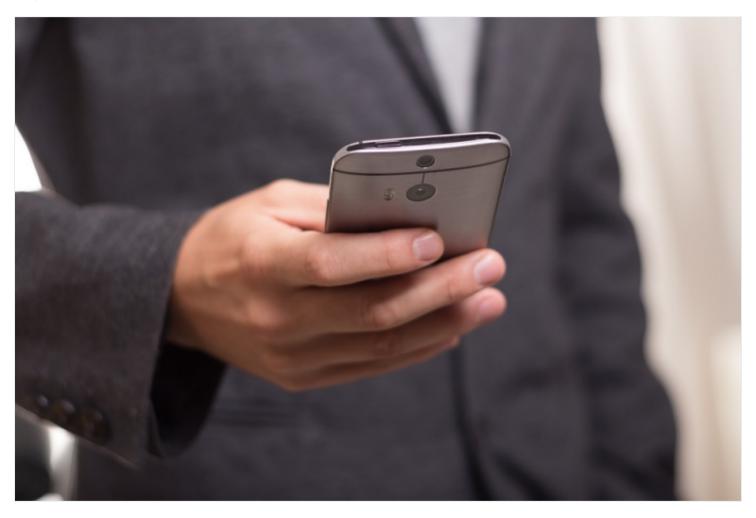
Practice **Advisor**

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

messaging, sometimes this question rails alreedly down generationarimes ...

Sep. 17, 2019



In the business communication classes that I teach, I'm often asked how we accountants should respond when clients want to communicate with us via text messaging. Sometimes this question falls directly down generational lines, with older accountants feeling their privacy is being invaded when they receive texts from clients, and younger accountants acting surprised when someone doesn't want to communicate with them by text.

But I'm not here to single out a particular generation, and, in truth, the reaction to

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

client that is the best way to reach you.

I believe, however, that the client's wishes for communication should be respected as well. If a client is uncomfortable with a particular form of communication, wouldn't you want to allow the client to reach you using a different method? For the most part, we're just trying to find a way for the client to get information to us so that we can provide a better service to them.

One method is to use a preferred messaging platform where all client communication occurs – this can be a communication platform through your website or an app where your client can leave a message and even upload information any time of the day or night, and then you can retrieve the message and information on your schedule.

Then there is the triumvirate of traditional telephone (voice mail), computer (email), and smart phone (text, as well as voice mail and email). You can provide your client with access to your land line or VOIP number and your email address so that the client can make contact and leave a message whenever it's convenient. That still leaves open the discussion of texting.

Originally, giving out our mobile numbers was something we only did with family and close friends. In part, that was because text messages were costly – now they're typically part of a data plan and we don't pay by the message. But also, we held our mobile numbers close to the vest because we didn't want our after-hours personal lives interrupted with non-personal communiqués.

I'm a text person myself. I like the ease of sending a message via text and I don't expect an immediate response. I like not having to provide a formal letter with salutations and signatures. And I actually like that my clients feel comfortable enough with me to contact me via text when they have a question.

The caveat, however, is that we are still professionals, and when we provide

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

CPA Practice Advisor 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.

© 2024 Firmworks, LLC. All rights reserved