CPA
Practice Advisor

engagement. Everyone needs to understand the client's part, the firm's part, and the collaborative part. Communication policies help your firm achieve this goal. If your firm h

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By Judie McCarthy.

When it comes to engagements, firms tend to focus on what they'll do, how they'll do it, and what they will charge for a fee. But, often, a key piece is missing. A communication policy.

Having a clear client communication policy is often forgotten as a part of the

unique or individual points that you need to cover, here are some basic things to include in your policy.

Set Clear Client Responsibilities

First and foremost, make sure that the client understands their responsibilities. Outline these expectations clearly.

- If your firm makes a request, how quickly should the client respond?
- If the client fails to respond to questions, what are the consequences?

Make sure that clients understand they also have a responsibility to cooperate in the process. If they do not respond to questions in a timely manner, they should know that this will lead to delays and may have additional consequences. Depending on the circumstances, their lack of communication may change the engagement.

Additionally, clients should be encouraged to be proactive about communication. When I was running my firm, we asked clients to notify us if they:

- Had a business change
- Made a major purchase
- Opened a new bank account or line of credit
- Will be away or unavailable for a period of time

Asking clients to keep you updated about critical changes can help your firm take important steps to adjust to these changes early on. Establishing ground rules and expectations for clients will help ensure smooth communication and set important boundaries.

Outline Your Firm's Responsibilities

depending on the engagement type. No one knows your firm better than you, so choose a response time that best fits your firm's schedule and workflow.

Status Updates

Every firm should provide status updates, whether it's for accounting, bookkeeping, tax engagements, or advisory engagements. These updates keep clients in the loop and ensure they feel taken care of. Make sure that clients understand when your firm will complete the work. Do you have a specific day of the week or month when you service clients or when your deliverables will be available?

Communicate your delivery dates and ensure that clients know when the work has actually been completed. If there are delays, let clients know. Explain why the work is delayed and when you expect it to be completed.

Check-ins

Firms should be checking in with clients from time to time to see where everyone is at and whether there are any changes or issues that need to be addressed. Plan for these check-ins and communicate their frequency in your communication policy.

While every firm and client base is different, it's a general rule of thumb is to meet with clients quarterly at a minimum. These brief check-in meetings help you stay in touch with your clients and continue building your relationship. It's also an ideal opportunity to:

- Discuss their financials and help them understand the financial health of their business.

- Ask for feedback. Is the team meeting their expectations? Are they responding on time? Client feedback will help you improve your service and ensure that clients get the experience they desire.

time-consuming. Some clients may be sending emails, others may be communicating on Twitter, and then you may have clients texting you. It becomes a game of cat and mouse to find messages and ensure they're receiving a response in an appropriate amount of time.

Setting rules for communication channels can help prevent these types of situations. Clients know precisely how to reach you and which channels are most appropriate for each type of communication. If you want to streamline communication even further, you can use a collaborative platform that handles client communication from a single place.

Having a centralized communication channel ensures that everyone – staff and clients – don't miss a beat. Our firm chose to handle all client communication through Client Hub because it allowed us to not only send messages to clients but also create task lists and securely share files with ease. Internally, our team was able to organize jobs, view tasks, and create notes for clients.

When you're using a single platform, it prevents communication silos. Additionally, when you choose a platform that allows you to monitor firm response times, you can ensure that your staff are responding on time and meeting their obligations.

When creating your client communication policy, make sure you're clear about where and how clients can communicate with you. It may also be helpful to inform them that communication outside of these designated channels will not receive a response.

Establishing a Clear Client Communication Policy is Crucial

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Having a client communication policy can save your firm time and frustration.

schedule a demo, click here.

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