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FIRM MANAGEMENT

3 Ways Software Can Improve CPA-Client Communication

Visual reporting software enables CPAs to communicate more effectively with clients. CPAs can show businesses in detail their financial status and where they are headed.

Justin Hatch • Jul. 19, 2022



CPAs are skilled in analyzing financial data and determining how it impacts the clients they serve. While this financial prowess is a valuable tool for businesses, effective communication is a skill that is equally important. Communication is so essential that **97 percent** of employers said soft skills like communication were as important or more so than hard skills.

While good communication is a key skill for CPAs, it does not always come naturally. It is often something that must be developed and worked on consistently. Luckily, in this day and age, there is often a technological tool to help. Along with working on **interpersonal communication** tactics, CPAs can take advantage of software to improve communication with clients.

Be More Accessible

Sometimes, the biggest hindrance to communication is the availability of a CPA when a client comes calling. CPAs can utilize technology to ensure they are accessible to their clients and their relationship of trust is not compromised by being hard to reach. CPAs do not need to be at a client's beck and call 24 hours a day, seven days a week. However, making the effort to talk to clients regularly—even checking in outside normal hours—lets them know their CPA is a trusted member of their team.

The COVID-19 pandemic ushered in a sudden need to communicate from afar—and it showcased technology that makes it possible. CPAs can use **video conferencing** software to conduct virtual meetings from anywhere in the world. Firms can also put **Voice Over Internet Protocol** software to use, allowing CPAs to use a secure phone line from anywhere to communicate with clients while protecting their data. Using these software options ensures CPAs can be there for their clients when they need them most.

Give Instant Feedback

When clients have questions or concerns, they want to know their CPA is on the ball and ready to assist them. Great communicators are quick to respond and provide feedback, reassuring clients that they are in good hands. Enter **cloud-based** software that can give near instantaneous results and act as a conduit between clients and their CPAs. Recent research showed that companies using cloud accounting software exclusively saw **15 percent growth** year over year. Better communication with clients is no small part of this success.

Using cloud-based software allows CPAs to be more responsive to their clients and communicate quickly and accurately. Using the cloud to enter data and deliver analysis to clients gives them answers right away, and dashboards allow clients to see their financial performance in real time. Often, when clients have questions for their CPA, dashboards can be configured on the spot to show them what they need to know. CPAs can communicate rapid responses and accurate results for their clients with cloud software.

Provide Clearer Information

Have you ever had a conversation with a client, then felt as though your insights and advice fell on deaf ears? It's quite possible that your analysis of the client's financial data didn't have the impact you hoped, but it may not be because your client didn't want to hear it. Talking with clients is important, but people don't always fully retain the information they hear. One study found that as many as **80 percent** of people are visual learners, when compared to auditory learning. Your clients are much more likely to hang on to your every word when your advice comes with visuals.

CPAs provide their clients with valuable financial information, and good communication means ensuring clients understand that information. Visual reporting software enables CPAs to communicate more effectively with clients. CPAs can show businesses in detail their financial status and where they are headed. This software allows CPAs to explain their analysis more clearly, while clients are also more likely to retain and utilize the data for the benefit of their businesses.

CPAs must be good communicators as they build relationships with their clients and provide invaluable financial analysis and advice. This software and others can help CPAs improve their communication with clients as trusted advisors.

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Justin Hatch is CEO of [Reach Reporting](#).

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