CPA
Practice Advisor

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what they're referencing and 60% of accountants ...

Oct. 18, 2022



A new study commissioned by Canopy, a cloud-based practice management platform for accounting professionals, found that accounting practitioner's clients are typically more responsive than their own coworkers.

The study of 150 accountants based in the U.S. uncovered that 70% of accountants and staff report that it is generally easier to get a response from their clients than their own coworkers. Additionally, among senior partners, 76% have had to "over

communicate" with staff to explain what they're referencing and 60% of

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Accountants need streamlined firm communications to effectively communicate with clients and coworkers:

- 91% of accountants and staff say they regularly want to reference client messages (i.e. screenshots of texts or emails, forwarding of emails) within firm communications, but only 42% are sure they can do it easily

- 51% of accountants and staff say forgetting to "reply all" has caused work delays and confusion in the past month
- 37% of accountants say they have missed a client deadline because of poor office staff communication
- 37% of accountants and staff have missed important information because their firm uses too many communication channels

"Practice Management software like Canopy's can respond to these struggles by offering internal conversations in context, which saves a lot of time, effort, energy, and morale," continued Furr.

Accounting • Firm Management

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