

# Effortless Engagement:

7 Ways to Optimize  
Client Collaboration



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# Learning Objectives

- Identify the top client collaboration challenges highlighted in the 2024 Woodard/Mango Accounting Industry Report, including delays in document collection and scope creep.
- Evaluate communication tools and technologies, such as client portals and workflow automation, to enhance client collaboration during the busy season.
- Develop actionable strategies to improve client communication workflows, minimize inefficiencies, and align expectations with clients.



# Agenda

- Overview of Key Findings from the 2024 Woodard/Mango Accounting Industry Report
- 7 Proven Strategies to Optimize Your Communications Processes
- Next Steps & Questions



# Section 1: Key Findings



# Purpose of the Report: *Why it matters?*

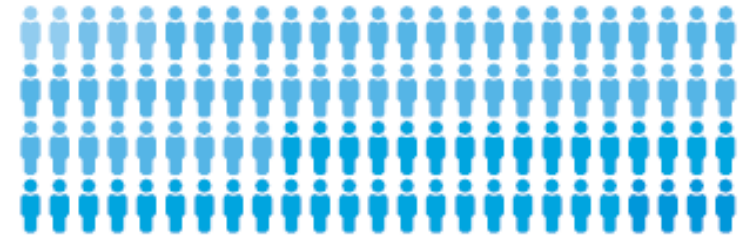
- Challenges in the Accounting Industry
  - Increasing client expectations
  - Tight deadlines and the volume of work
  - The effect on profitability
- Objective of the Report
  - Insights to address challenges with actionable strategies



## Who we heard from:

- 287 accounting professionals across the United States
- 93% of the survey participants have extensive industry experience

### Role of Survey Respondents



**10%**  
Manager

**31%**  
Other

**54%**  
Partner

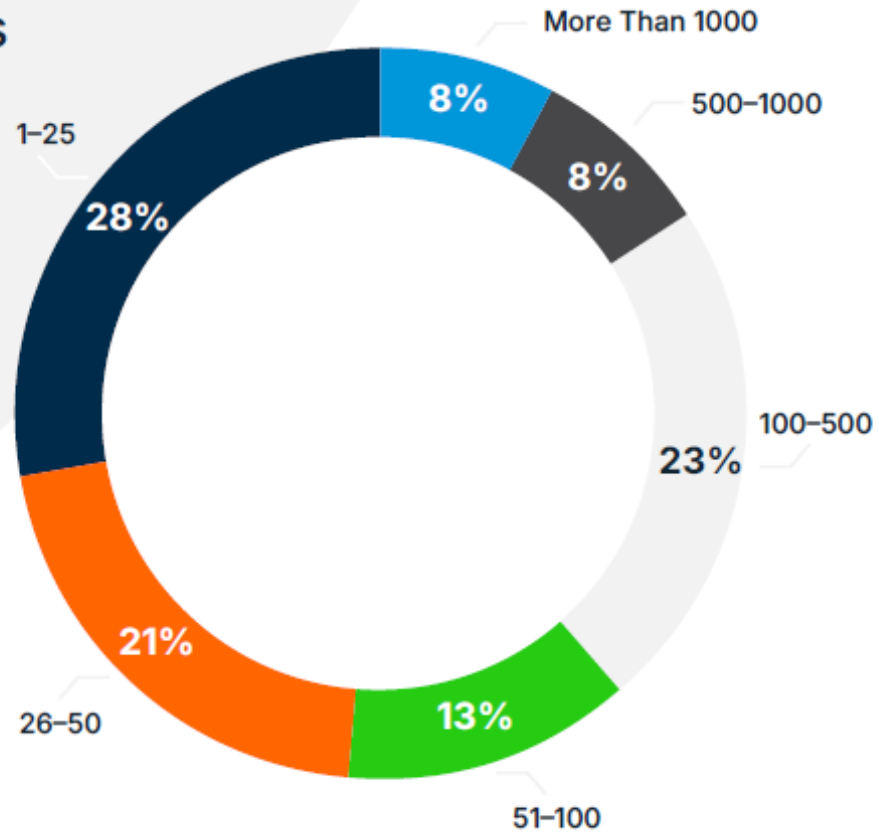
**3%**  
Senior  
Accountant

**2%**  
Staff  
Accountant

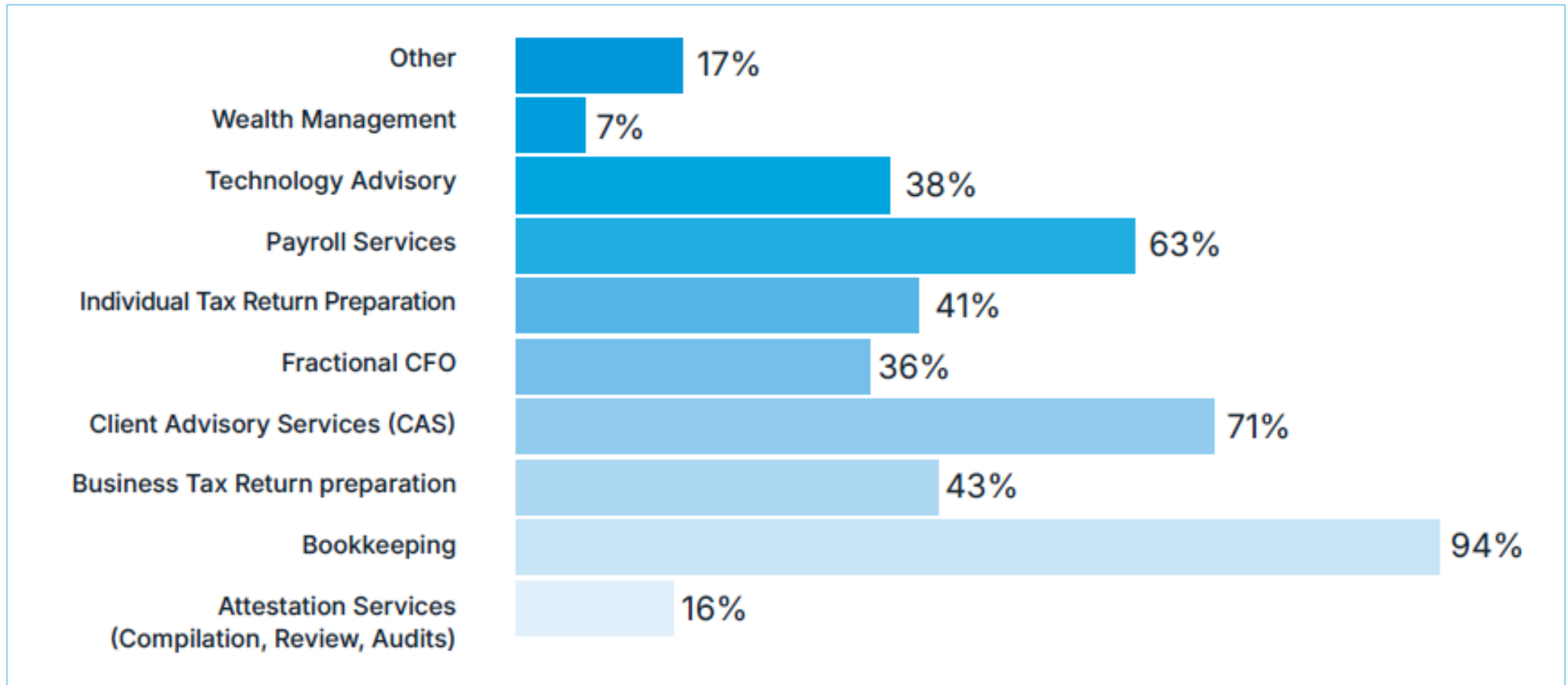
## Number of Clients Served by Survey Respondents' Firms

The accounting industry survey represents a diverse mix of clients managed, with 16% of firms managing over 500 clients and 49% handling 50 or fewer.

Thirty-six percent of firms represent the midrange with a client base between 50–500 clients.



# Primary Services Offered





# Top Challenges Identified

- Document Collection Delays (69%)
- Scope Creep (64%)
- Setting Expectations (46%)
- Inefficiencies in Communication



# Technology Insights

- Popular Tools:
  - Email (93%)
  - Phone calls (73%)
  - Client portals (56%)
- Underutilized Tools (<30%):
  - Workflow automation
  - Customer Relationship Management (CRM) systems
  - Automated reminders



**Tech-savvy firms report an average of 80% increase in time savings and 61% better client communication.**

# Section 2: Proven Strategies to Optimize Communication



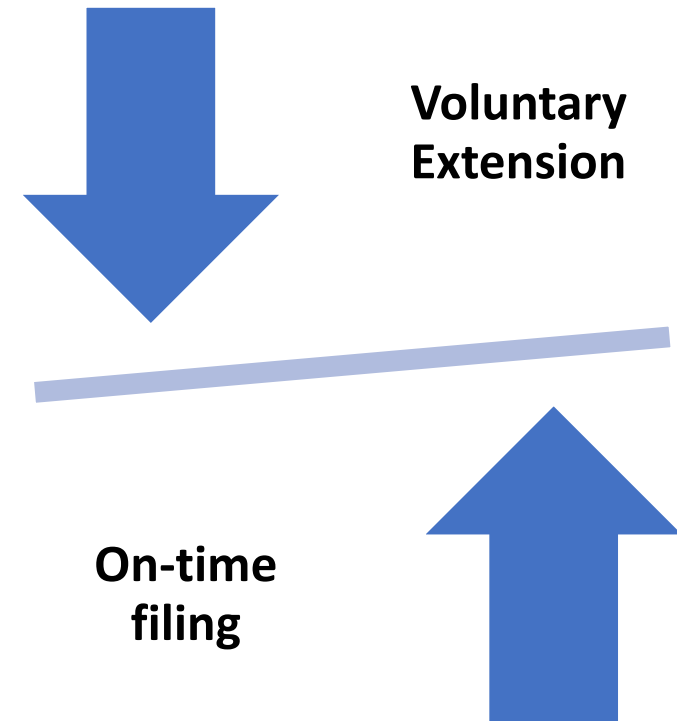
# Strategy 1 – Build a Strong Client Onboarding Process

- Create a standardized onboarding checklist
- Provide a “Welcome Kit” that includes a step-by-step guide outlining firm processes



## Strategy 2 – Set Clear Expectations Upfront

- Utilize engagement letters with defined nature ***and scope***
- *Confirm client understanding*
- Align your pricing with expectations
  - Price increases if information not received by a certain date, or....
  - Price decreases if client agrees to extend



## Strategy 3 – Implement Client Portals

- Emails are not secure and can get lost – ditch the email
- Portals provide secure, centralized access for both clients and your team
- **Practical Tip:** Create an auto-response email directing clients to your portal



# Sample Auto-response Email

**Subject:** Important Information About Reaching Us

Thank you for your email!

To ensure the fastest and most secure communication:

•**Current Clients:** Please send me a message through our client communication portal here: [Insert Portal Link].

•**Non-Clients:** Email responses may take 5 to 10 business days. If you need immediate assistance or would like to discuss a project, please schedule an appointment here: [Insert Appointment Link] or call [Insert Phone Number].

We appreciate your understanding and look forward to assisting you!

Best regards,

## Strategy 4: Automate Client Reminders

- Reduces follow-up communication
- Ensures deadlines aren't missed
- **Practical Tip:** Use automation tools to send email/text reminders





## Strategy 5 – Streamline Touchpoints

- Simplify Client Communication
  - Reduce back-and-forth emails by consolidating updates
  - Create email templates for common requests
  - Automate reminders for missing documents and deadlines
- Practical Tip: Virtually all email and CRM apps include template functionality



# Strategy 6 – Implement Workflow Automation

- Improve Internal Workflows
  - Use workflow apps to define processes, track progress and eliminate bottlenecks
  - Automatically assign tasks when client actions are completed
  - Improve consistency across engagements
- Practical Tip: Use practice management software to track and automate



## Strategy 7 – Offer Client Education

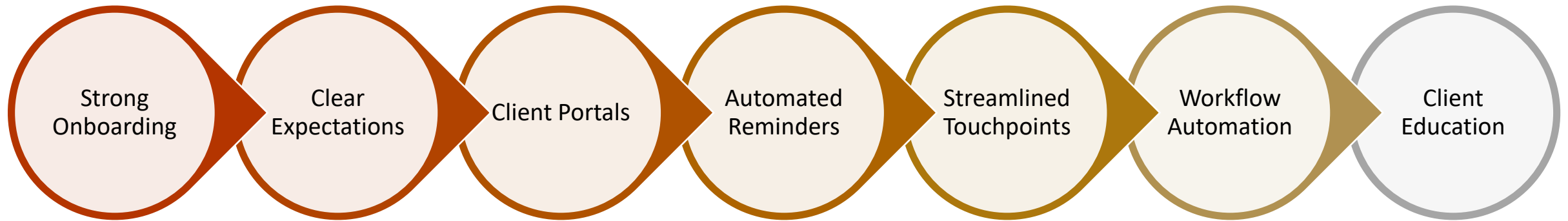
- Education clients to improve collaboration
  - Offer lunch-and-learns or webinars
  - Record instructional videos
- Practical Tip: Create email templates with instructions (video and/or step-by-step visual instruction)



## Section 3: Next Steps



# Recap of the 7 Strategies



## What to Do Next

- Implement one of the 7 strategies immediately
- Download the full 2024 Woodard/Mango Accounting Industry Report
- Create a plan to optimize over the next 12 months



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