How Client Collaboration Elevates Client Experience at Your Accounting Firm

The landscape of the accounting world has changed rapidly in the last decade. Currently, 94% of accountants use cloud-based software for their accounting practice. While a bigger tech stack can help your firm grow, there's still a key piece of the puzzle that gives your firm value: client experience.

Your accounting firm would be non-existent without your clients, so you need to focus on making their experience the best possible.

Follow this guide to remove bottlenecks and streamline client collaboration for the best possible experience at your accounting firm.

What makes a positive client experience?

To make client collaboration impactful, it needs to be baked into the client experience. What does that entail? Consider these ways to elevate the client experience through improved collaboration (with the help of cloud-based accounting practice management software).

Focus on communication

Clients shouldn’t have to call your o ce repeatedly to get an answer from you. If they can’t reach you to discuss questions or concerns, then you may lose them to competitors—and quicker than you’d expect.

That’s why you need cloud-based tools like CRM software to stay in contact with your clients. CRM offers automated reminders to keep clients on track with payments or remind them that a meeting is coming up. It also contains analytics with vital information, like client communication preferences. If one client sees email as the new snail mail but is rapid-fire texter, then you know that when you need something from that person, SMS messaging is the best way to go.

Another way to improve communication is to invite clients to use your project management software. When you add clients to their projects, they can see relevant files and get their questions answered. You can even assign them tasks so they know if they need to send you a relevant tax document or pay an invoice by a certain date.

Prioritize responsiveness

Responsiveness moves client work further faster—but the issue isn’t typically with clients. It’s with your team. 70% of accountants say that it’s easier to get a response from clients than from their team members.

Outside of accounting practice management software, make it a habit to block o a certain amount of time per day to call clients back. They're paying you for your services, so you need to be able to answer their questions. It also depends on the type of client— if this is someone who has you on retainer for advisory services, then you need to be able to respond and advise them as needed in a timely manner.

You can also use tools in your CRM to respond faster. For example, you can create a survey on your website that will ask them questions about the type of accounting services they need. Then, use CRM software to automate an email with a link to smart client intake forms based on their responses in the survey. This strategy lays the path for a responsive, client-centered intake process before you've even spoken with them!

Increase convenience whenever possible

With any service offered, you want to make working with you as simple possible for your clients. One of the most convenient options you can give your clients is online payments. Online payments allow clients to pay with their preferred payment methods, and they can pay in seconds using their smartphones.

Online payments also allow for flexible billing options. If a client doesn't want to have to remember to pay at all, you can set them up on a monthly retainer. Or, if a client needs to pay their bill at a slower pace than usual, arrange appropriately flexible payment schedule.

Mango Payments allows clients to pay invoices straight from their smartphones in seconds (and you'll see the funds in 24-48 hours!)

Client collaboration and your services

Client collaboration should involve reducing time-consuming processes involved in your services. (Not only does this improve the client experience, but it also can improve your eficiency and profitability—a win-win if there ever was!)

To improve client collaboration while also giving your services a boost, consider the following:

Consider services that benefit them best

If you're considering adding something like advisory services to your firm, send your clients a survey to see what they're looking for. Ask them what they think about the services you've given so far and whether there's anything else they need from you.

If services are requested by multiple clients, focus on adding those to your repertoire to establish a higher-value relationship.

Automate non-billable tasks to find more time for client tasks

Use billing software to streamline invoicing, using tools like batch billing to invoice multiple clients with similar line items at one time.

This allows you to spend less time on invoices and more time on billable hours for important client work.

Mango's client portal comes offers bank-level security with 256-bit encryption, so your client's personal information is safe from hackers.

☑ Make document sharing simple

Accounting is a profession that involves a lot of documents that inevitably move between client and accountant. But how exactly do they make that journey? (And is it full of unnecessary pit stops or road blocks?)

If you're going to prioritize both client experience and client collaboration, you need to consider the methods you're using for sharing documents. Tried-and-true methods of printing and mailing are too cumbersome for today's clients, but thankfully there are better options out there. Both client portals and secure file-sharing allow for clients and accountants to seamlessly collaborate on documents. Each option has its advantages, depending on how you run your practice and the needs of your clients:

- **Client portal:** provides a one-stop-shop for your accounting clients, giving them access to not just documents, but billing information, communication, and more. Client portals are secure, user-friendly, and when used alongside your accounting practice management software, make it simple to keep information aligned.
- **Secure file-sharing:** If your clients prefer to avoid client portals (whether it be because they already have one too many passwords to remember or they're not interested in learning how to navigate one), secure file-sharing lets you easily send important documents and files to clients with just a few clients. Even better? It's just as easy for them to send said documents and files back to you.

Maximize client collaboration with Mango Practice Management

Mango was made by accountants, for accountants, so we understand the tools you need to improve your client experience.

Our accounting practice management software comes with everything you need to streamline your practice, all in one convenient place, including:

- Online payments
- Client portal
- Time and billing software
- And more!

To learn more about how we can help you create happy clients with simple but powerful communication tools, schedule a demo with Mango today.

SCHEDULE A DEMO