

Best Practice Checklist for Clients in Crisis (COVID 19)

We know that you are now speaking to clients more than ever. We spoke to accountants and bookkeepers to hear how they're guiding these conversations in these testing times.

Communication tools

- ✔ Separate your work and personal phone numbers and set working hours to reduce your risk of burn-out.
- ✔ Set up a video calling conference (such as Zoom) to allow for more personal, face-to-face communication.
- ✔ Integrate tools such as Calendly and Google Calendar to let clients choose a time that automatically suits you both.
- ✔ Use cloud-based solutions over desktop to ensure effective communication and timely delivery of documents.
- ✔ If you rely on receiving expense paperwork by hand or courier, introduce Receipt Bank to digitise documents fast and lower the health risk.

Staying informed

- ✔ Stay in touch with clients and let them know that you're there for them. If possible, call each client to guide them through the help available.
- ✔ Be a trusted source of information and provide updates on news changes where relevant.
- ✔ Stay calm, focused and supportive. Remind them that no-one is alone in this and that this economic downturn is temporary.

Cash-flow

- ✔ Encourage clients to review and minimise non-essential expenses, and to pivot and explore other income opportunities they can leverage.
- ✔ Consider offering a temporary discount for businesses who have no income for the next few months if you are able to.
- ✔ If clients are out of work, consider offering assistance on business planning or - if applicable, help with marketing plans or website overhauls.
- ✔ Discuss the potential risks of their supply chain and the knock-on impact of falling currencies. Consider how they can mitigate these in a short period of time.

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