Digital File Sharing

The Secret Sauce to Keeping Your Clients Happy

As a seasoned accountant, you're already familiar with the fundamentals of customer service. You know that you need to be polite, understanding, and helpful. Not only do you know this, but most accountants know this. So when it comes to growing or maintaining your practice, how do you keep your clients happy and continuously offer top-of-line customer service?

The key ingredient to keeping clients happy is constantly striving to make things easier on them. For example, you're already making their lives easier by filing their taxes and ensuring that they get their maximum refund. But what about everything they have to do on their end to achieve that result? Do your clients have to do a lot of manual work? Do they have to mail in their W2s or financial statements? Or are they still sending these documents via email, leaving their most sensitive and private information at risk?

If you answered yes to any of these questions...

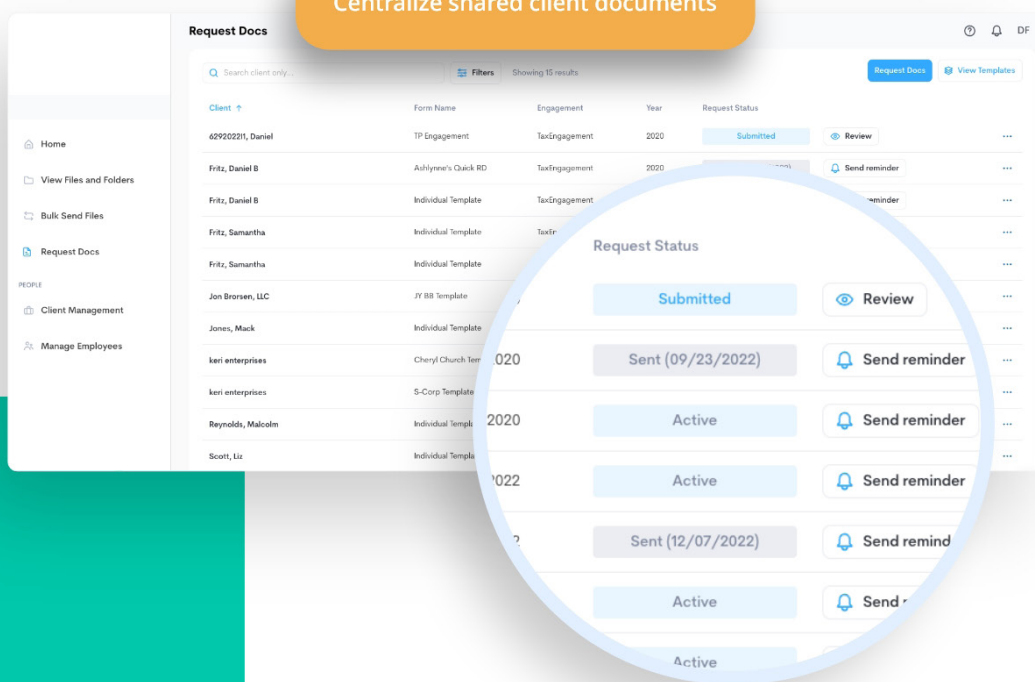...then consider moving to a digital file-sharing solution.

Collecting documents from your clients to start their tax returns can be tiresome, time-consuming, and unrewarding. With a digital file-sharing solution, you can streamline the document collection process without compromising on security.

For example, the SmartVault Request Docs feature was built so that accountants could send a specific checklist of documents required to process tax returns. This feature allows accountants to not only send these checklists within a few clicks but will enable them to track the status of each list for each client from an easy-to-view dashboard. This helps reduce time on the clients' end and helps reduce frustration.

In the past, you may have sent an email (or two) listing out everything you need from your clients. Clients would then have to dig through their inbox to search for that list and manually attach each document to their email reply. Features like Request Docs make it easy for clients to log in to their client portal, see what specific files you are waiting for, and work down the list by uploading files directly into the portal. Users are notified as soon as the entire list is complete and can access all of their files directly from SmartVault.

This has reduced the amount of time it takes for accountants to wait on documents and the amount of time it takes for clients to upload them. By using a digital file-sharing solution, you are not only further protecting your clients, but you are making their lives exceptionally easier – and yours too! Does client satisfaction get any easier than that?

Centralize shared client documents

SmartVault

Built with bank-level security, SmartVault offers a cloud-based document management system and client portal designed to help you reduce costs, raise productivity and employee happiness, stay in compliance, and deliver higher levels of service.

SCHEDULE A DEMO

smartvault.com