

The 10 Non Negotiables of Client Management and Communication

1. Client phone calls and emails are replied to the same day received. Even if to say, received call/email will respond OR have CSM contact client on your behalf.
2. Work is allocated / delegated to the appropriate team member.
3. Systems, processes and checklists are used, consistently.
4. The 'basics' - compliance work and lodgments are completed on time and by due dates.
5. A fee proposal is communicated to ^{the} client before starting work if it is not already covered by the annual fee agreement.
6. The AYFS requirements are completed and updated annually (normally with Annual Accounts meeting).
7. Annual Accounts meeting occurs once annual financial statements and taxation returns are completed.
8. There is a minimum of monthly communication to clients under management. This maybe directly or via marketing communication.
9. Prior to going on leave client work is planned and necessary arrangements are put in place to ensure clients under management are being looked after. This includes an automated email response as follows:

Thank you for your email. I am currently on leave until ENTER DATE. I will not have email access whilst away so please contact the following team members for assistance.
ACCOUNTANT NAME & EMAIL ADDRESS, CSM NAME & EMAIL ADDRESS
10. We are outcome focused rather than timesheet focused.

The Right People Doing the Right Work

A team is a group of individuals all working together for a common purpose. Each team member has a role in the team to achieve the goal or result.

To deliver Client Fulfillment it is important that we work as a team and understand our role and the tasks attached to that role, and ~~the understanding of the importance of~~ ^{the} your contribution in the outcome.

This will ensure as a team we are directing our time and focus in the way required to have the capacity to deliver Client Fulfillment.

Much of our time is invested completing The Basics. However on a daily basis there is so much more to do to help clients and having the capacity to complete this additional work is vital to delivering Client Fulfillment.

This work is not necessarily difficult. It is more about being organized, collecting, collating and checking information throughout the year.

Systems, processes and checklists are critical for the controlled flow of this work. The volume of work is high with lodgement deadlines to be met. It is important that the 'right' team members are completing each part of the process.

Having access to this level of financial information we are in a very privileged and fortunate position. This information can be used as the basis to help clients further so we deliver Client Fulfillment and live up to our Core Purpose.

The 'Are You Financially Secure' process^X

At Mulcahy & Co. we are in a unique position to provide the expert advice and solutions of accounting, financial planning, lending, legal and information technology all under one roof. This makes a normally complicated process seamless to help you on your way to becoming financially secure.

What does being Financially Secure mean?

It means assessing your personal and business goals, and developing a plan to achieve them. Follow our 10 STEPS TO SUCCESS to achieve FINANCIAL SECURITY.

