



How to Collaborate
with your Clients to keep
Tax Season Stress Free





Ah, tax season is on its way again!

Preparing for the busiest time of the year can seem daunting—for you, but also for your clients. Many small business owners are not as organized as they would like to be, and many are worried about their tax liability. Likewise, many individual taxpayers have concerns about filing their taxes and the financial implications of their returns and payments.

But even with an increased workload between now and April, there is a great deal that accountants can do to decrease frustration on both sides—while also running a more efficient and profitable accounting practice. One of the most impactful steps involves embracing client collaboration.

Client collaboration reduces the challenges of tax season while also maximizing resources for everyone. Read on to learn how accountants and their clients can make this tax season the least stressful one yet!



The challenges of tax season for accountants (and clients!)

There are several challenges that accountants face during tax season. The days are busy, time is limited, and the pressure to meet deadlines causes accountants to need to work quickly while maintaining the same high degree of accuracy. What's more, accountants must keep track of complex and ever-changing tax laws.

But perhaps the biggest challenge for accountants during tax season is working effectively and efficiently with clients. After all, accountants aren't the only ones who get stressed during tax season. Your clients might have worries about correct filings, the cost of paying taxes (and their accountants!), and even fear about a potential audit.



The following challenges might be presented:

- **Managing client expectations:** Some clients may have unrealistic expectations about the process or the outcomes of their tax returns. It can be hard for accountants to manage these expectations and communicate effectively with their clients.
- **Dealing with difficult clients:** Not all clients are easy to work with, and tax season can be especially hard if an accountant has to deal with difficult or unreasonable clients.
- **Staying organized:** With so many clients and deadlines to keep track of, staying organized and managing their clients effectively during tax season can be overwhelming.

So what's the remedy? How can accountants work with their clients to make sure they remain satisfied with their services while still making sure the accountants are as efficient and accurate as possible?



Client collaboration for accounting firms



Client collaboration is key to improving your firm's operations and client relationships. Client collaboration refers to the process of working with clients to gather necessary information, understand their needs and preferences, and communicate effectively to ensure that their tax returns are prepared accurately and efficiently.

Effective [client collaboration](#) may involve the use of various tools and techniques, such as project management software, online collaboration platforms, and document-sharing tools. It may also involve regular meetings and check-ins with clients to discuss progress, address any concerns or issues, and keep them informed of their tax preparation status.

Benefits of client collaboration

By working collaboratively with clients, accounting firms can ensure that they meet client needs and expectations, reduce stress, and avoid misunderstandings or errors. These steps can go a long way toward establishing a solid client relationship—and positive, productive client relationships are a selling point for any accounting firm.



(In fact, when clients look for accountants today, the [top two skills](#) they often seek out are technology literacy and relationship building. Client collaboration demonstrates to your clients that you're committed to delivering on both of these.)

Tools for client collaboration in your accounting firm

Staying on top of client accounts can be a challenge—and that's why technology can be an excellent tool to leverage to increase collaboration between you and your clients during tax season. Client collaboration tools can keep your accounts organized and efficient, and your clients looped into the status of their matters.

Tools to consider implementing include:

1. File-sharing & eSignature software

File-sharing and eSignature software can support client collaboration in accounting firms by providing a platform for sharing and collaborating on documents with clients. This can save time and reduce the need for in-person meetings or exchanging physical copies of documents.



File-sharing software allows you to store and share documents with clients and team members, either through a cloud-based platform or by uploading and downloading files from a shared folder. This makes it easy for clients to access the latest version of a document and for team members to work on it together.

Also essential is eSignature software, which allows you to quickly sign and send documents for electronic signature from any device. This reduces the need for physical copies and in-person meetings. It can also streamline the document review and approval process and speed up turnaround times.

2. Client portals

Client portals are a central location for accessing and sharing information. Client portals allow clients to:

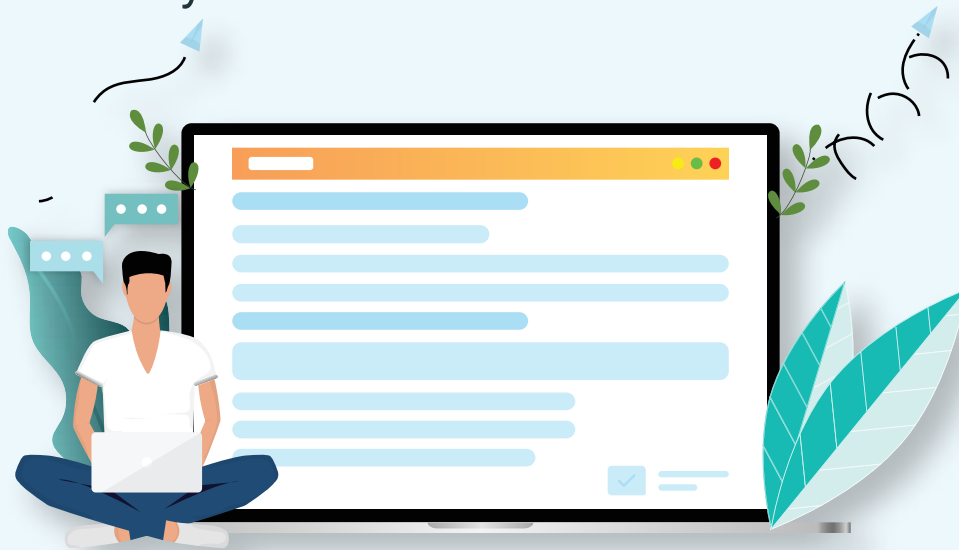


- Access documents and files
- Communicate with their accountants securely and confidentially
- Check the status of their document progress during tax season
- Pay invoices online

Client portals can also create a layer of self-service that is especially valuable during tax season! While some clients prefer to work outside of portals, many clients appreciate the convenience, increased access to their information, and ability to be more engaged with their accountant-client relationship.

3. Project management software

Practice management software can help firms to manage client projects and tasks, and keep clients informed about the progress of their work. It also helps your firm stay on track internally so that you can meet your client deliverables in the stressful and busy tax season.



4. Online invoicing and payment platforms

Accepting electronic payments can shorten the time it takes your firm to get paid and reduce the need for collections activities. It gives clients a full view of their account status and can expedite the entire process. Additionally, with secure online payment options built into your practice management software, you don't have to worry about fraud or security issues that come from third-party payment processors.

How to prioritize client collaboration in your practice during tax season

Here are some tips for incorporating client collaboration into your workflows during tax season:

- **Set clear expectations:** Make sure your clients understand your process, tools and software, and what you need to complete their tax returns. This will help them know what to expect and avoid any last-minute surprises.
- **Communicate regularly:** Keep your clients informed of their progress and any issues that may arise. This can be done through regular meetings, phone calls, or email updates, using a client portal will give clients more readily available and more comprehensive information on their project status.



- **Encourage your clients to gather all necessary documents:** The more organized your clients are, the smoother the process will be. Encourage them to gather all necessary documents well in advance of the deadline. Work with them to make sure all their documents are up to date, in your system, and accessible for both your use and theirs.

- **Be responsive:** If your clients have questions or concerns, address them promptly. This will help them feel supported and reduce their stress.



But one of the most important parts of client collaboration is using technology to your advantage.

Your tech tools—particularly practice management tools—are vital to facilitating strong client collaboration. For example, with Mango’s practice management software and its robust client collaboration features, you can keep your clients in the loop with up-to-date information and keep their projects moving along faster with client portals and eSignatures and file-sharing features. Mango even seamlessly integrates with your already existing tech stack to make implementing better client collaboration a breeze.

Make this tax season stress free with Mango's client collaboration tools

Mango Practice Management's accounting practice management software was made by accountants, for accountants, so you can trust that we know the exact tools you need to promote client collaboration. Our all-in-one accounting software stores all your critical client information in one place, so you don't have to jump between different software platforms.

To learn more about how our client-friendly suite of software tools helps you scale your firm, stay profitable, and get more done with less busy work, schedule a demo with us today.