

**2025**

**WOODARD®** |  **mango**

# ACCOUNTING INDUSTRY REPORT

## Tackling the Client Communication Problem

Authored by Kaleb Buckner  
& Heather Day Satterley

# CONTENTS

- 3 | Introduction**
- 4 | Executive Summary**
- 5 | Who We Heard From**
- 8 | State of Client Communication**
- 12 | Managing Client Needs**
- 17 | Finding the Right Fit**
- 20 | Communication Solutions**
- 24 | Measuring Success**
- 27 | Your Next Move**





# INTRODUCTION

Today's accounting firms face more pressure than ever to communicate and collaborate effectively with clients. They must deliver accurate, timely services, maintain responsive communication, and foster meaningful collaboration—all while keeping operations efficient and profitable.

**With expectations growing, accountants are navigating an increasingly complex communication landscape. Managing it all requires more than checking boxes—it involves figuring out the right tools and strategies to meet client needs without sacrificing efficiency.**

Because of that, it can be hard to figure out what works. Enter the 2025 Accounting Industry Report, brought to you by Woodard and Mango Practice Management. Our 2024 study uses various data sources to provide insights about technology, client communication, and collaboration in the accounting industry.

This summer, we surveyed 287 accounting professionals in the United States.

We set out to understand how accounting firms work with clients to define scope, manage expectations, and collaborate, particularly during the busy seasons.

We hope that accounting professionals will learn from their colleagues' strategies and successes so they can best prepare their teams and clients for the valuable work they're doing.



# EXECUTIVE SUMMARY:

## 2024 Woodard/Mango Accounting Industry Report on Client Communication and Collaboration

Across the board, firms are experiencing a wide array of client communication issues. Document collection tops the list of challenges, with 69% of firms reporting delays. But the struggle extends beyond collecting paperwork. Scope creep (64%) and setting client expectations (46%) also rank as significant issues, reflecting a deeper need for better communication and process management.

Disconnected tools, manual processes, and unclear goals can compound these problems, leading to lost billable hours and client dissatisfaction. But firms that use technology like client portals and workflow automation report significant improvements:

- 80% experience time savings
- 61% see better client communication

However, underutilization of technology is a missed opportunity. Less than a third of respondents use client relationship management software (CRM) or automated reminders, which are critical solutions for managing client relationships and reducing redundant tasks.

**Our findings suggest that firms that adopt technology strategically are better positioned to communicate efficiently, improve operations, and increase profitability—without jeopardizing client satisfaction.**

This is especially true for firms specializing in tax services, where well-managed communication strategies and technology are essential for success.

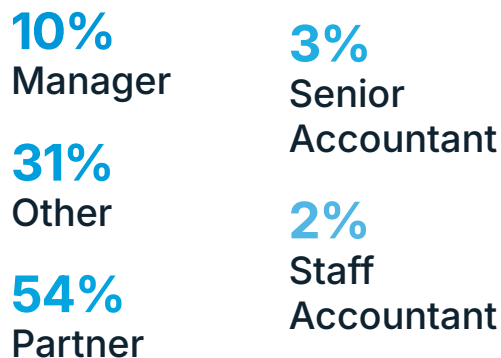
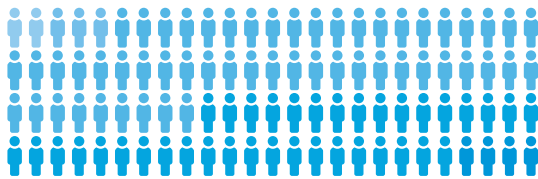
This report offers a road map for firms to learn from the successes and challenges of their peers, helping them improve communication practices and prepare for the year ahead. We hope that firms find new and effective strategies, setting the foundation for sustainable growth and profitability

# WHO WE HEARD FROM:

## Insights from Across the Industry

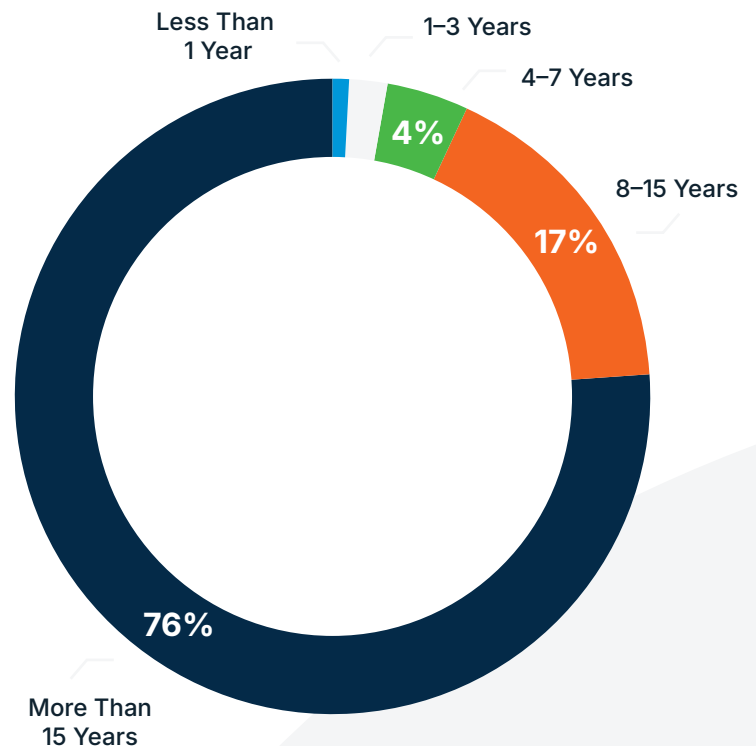
We analyzed and aggregated responses from 287 accounting professionals representing a range of firm sizes and services. Respondents were sectioned based on their role, years of experience, and firm size.

### Role of Survey Respondents



Most respondents (54%) were partners, indicating insights gathered reflect senior-level decision-making on communication and technology strategies.

### Years of Experience

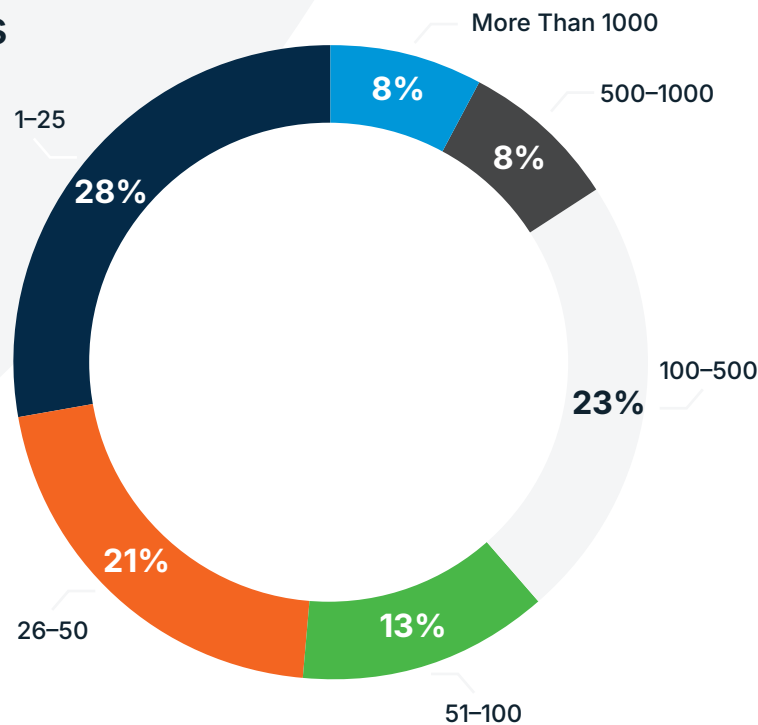


Overall, 93% of the survey participants have extensive industry experience. Seventy-six percent have more than 15 years of experience in the field, and 17% have 8–15 years, making the majority of respondents mid- to late-career professionals.

## Number of Clients Served by Survey Respondents' Firms

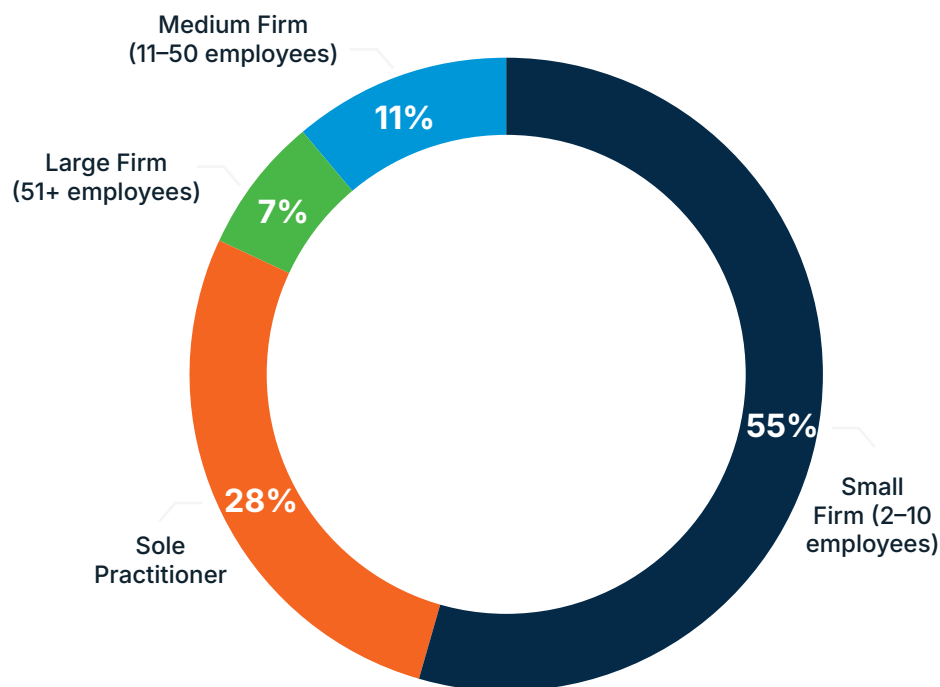
The accounting industry survey represents a diverse mix of clients managed, with 16% of firms managing over 500 clients and 49% handling 50 or fewer.

Thirty-six percent of firms represent the midrange with a client base between 50–500 clients.

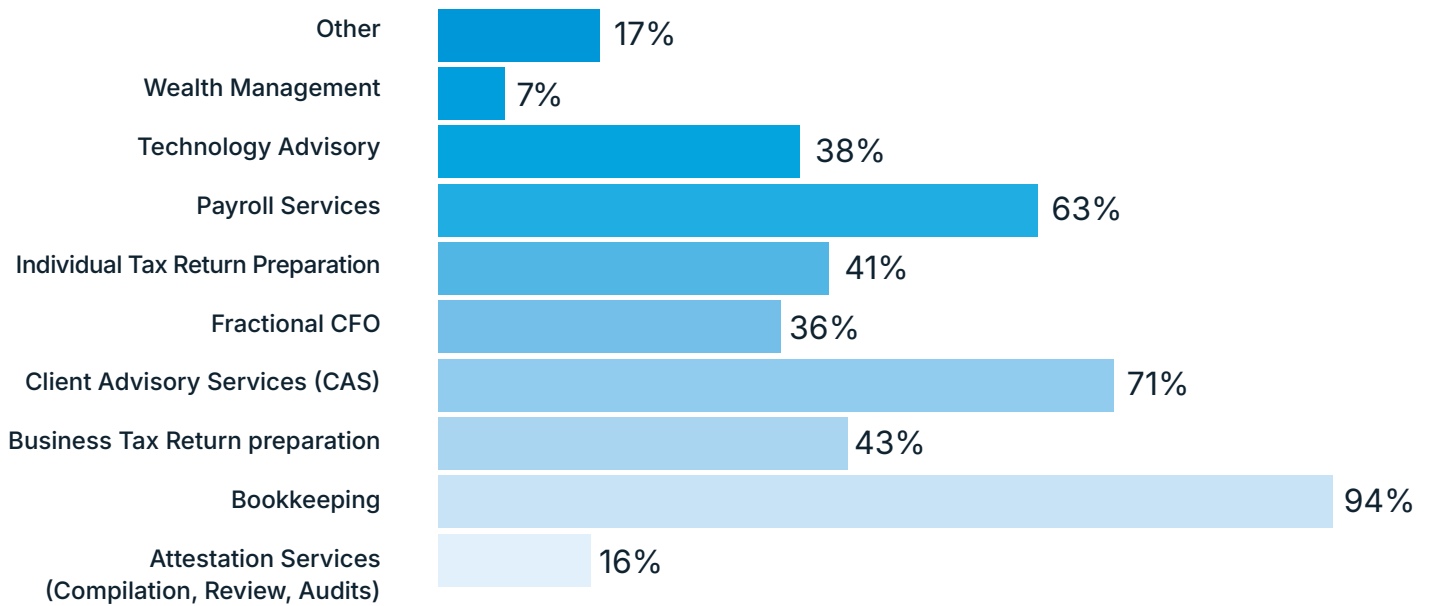


## Size of Firm

Respondents mainly consisted of smaller firms, with 83% having less than 10 employees. Eleven percent of the participants belonged to mid-sized accounting firms, and only 7% to large firms.



## | Primary Services Offered



Bookkeeping remains the cornerstone of respondent services, with nearly all firms (94%) offering it.

Client advisory services (71%) and payroll services (63%) are the next most offered services. Tax preparation offerings are also high, with 41% handling individual tax returns and 43% managing business tax returns.

Newer services are emerging for accountants, too. Thirty-eight percent of respondents shared that they now offer consulting on tech solutions, and 36% provide fractional CFO services to meet the needs of businesses requiring part-time financial expertise.

Attestation services, such as audits and reviews, are less common and offered by just 16% of firms. Wealth management remains a niche service, with only 7% of firms working with individuals and families with substantial financial assets.

This diverse range of services reflects the evolving landscape of the accounting industry as firms adapt to meet shifting client needs and expectations.

# STATE OF CLIENT COMMUNICATION

## In The Accounting Industry

Regardless of firm size or services offered, communication is directly tied to client retention and satisfaction rates. And in today's environment, it's not just what you communicate—it's also how you do it.

Technology like Zoom, email automation, and messaging platforms have shifted the business landscape. Easy access to digital communication has changed client expectations for responsiveness and accessibility from service providers.

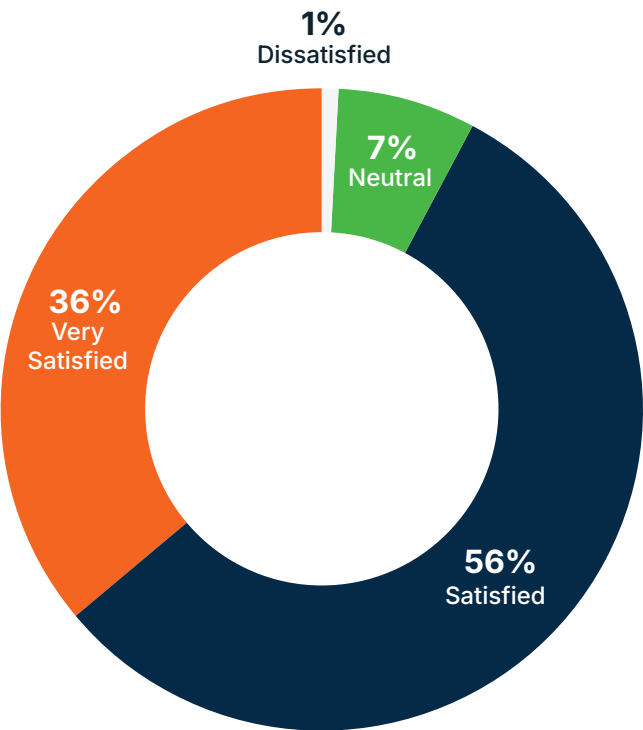
Similarly, tools that support client collaboration, such as accounting practice management software, client portals, and file-sharing services, contribute to how accountants exchange information with their clients—this information exchange ties directly to communication.

However, there are unique considerations to balance, with clients' growing expectations for fast, accessible communication on one side and upholding strict compliance requirements for the accounting industry on the other.

To create a complete picture of how accountants navigate these dynamics, we explored their feelings about their current client communication practices.

Most firms are in a good place with client communication, but there may be room for improvement.

How would you rate your overall experience working with clients?



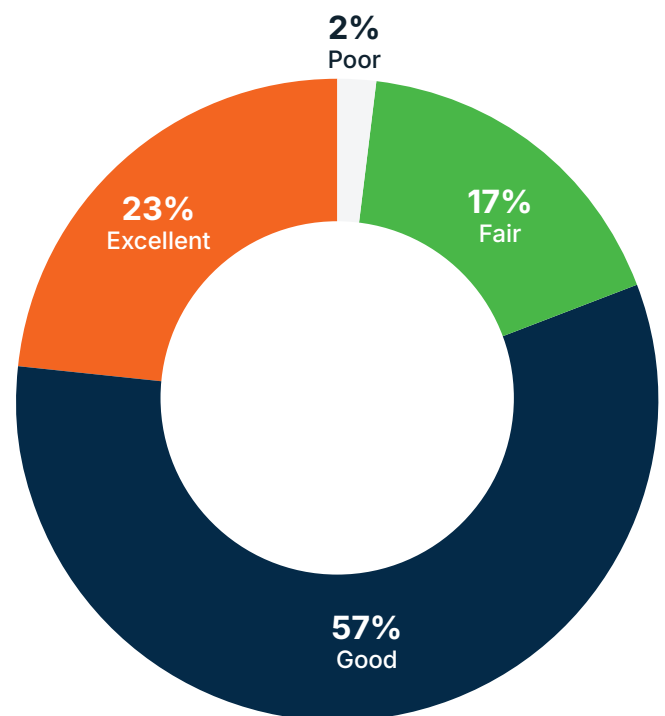




### How do you feel about the level of communication with your clients?

Accountants across all firm sizes, services, and roles report strong client relationships.

**The majority (93%) of respondents are either very satisfied (36%) or satisfied (57%) in their overall experience working with their clients. Only 1% report being dissatisfied.**



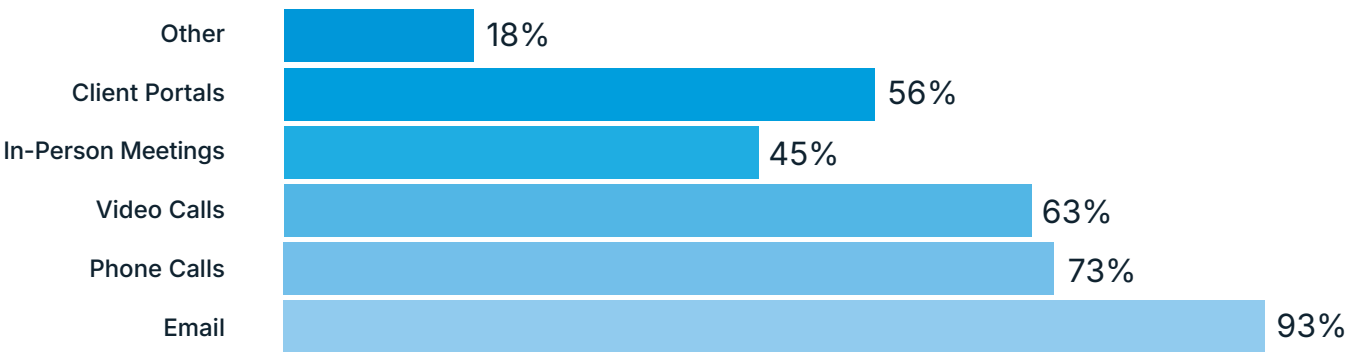
A majority (80%) also report strong levels of client communication, with 57% claiming they have good communication and 23% excellent communication.

Notably, though, the reported levels of satisfactory client communication are 8% lower than the overall reported client working experience. This discrepancy indicates that while firms have positive working relationships with their clients, communication strategies could be improved to align expectations and minimize friction.

## Accounting firms rely on a diverse mix of communication tools and strategies

With so many ways to communicate, we set out to see which tools accountants rely on most. It turns out accountants haven't gone fully digital. They mix modern tools with traditional methods to gather information, collaborate with clients, and maintain strong client relationships throughout every engagement.

### What are the most common methods of communication you use with clients?



Digital technology has made a big impact on client communication. Accountants almost universally use email, with 93% of participants relying on it. Additionally, accountants have widely adopted video calls, with 63% of respondents sharing that they use them.

Software also plays a role in client exchanges. Fifty-six percent of survey respondents share that portals are part of their toolkit. Client portals can offer accountants a lot of bang for their buck—they facilitate communication and aid in important operational tasks like document sharing and payments.

Some “old-fashioned” methods haven't been abandoned, though. Phone calls are significant in the communication landscape, with 73% of accounting firms using them as a means of client communication. Additionally, 45% of firms still conduct in-person meetings.

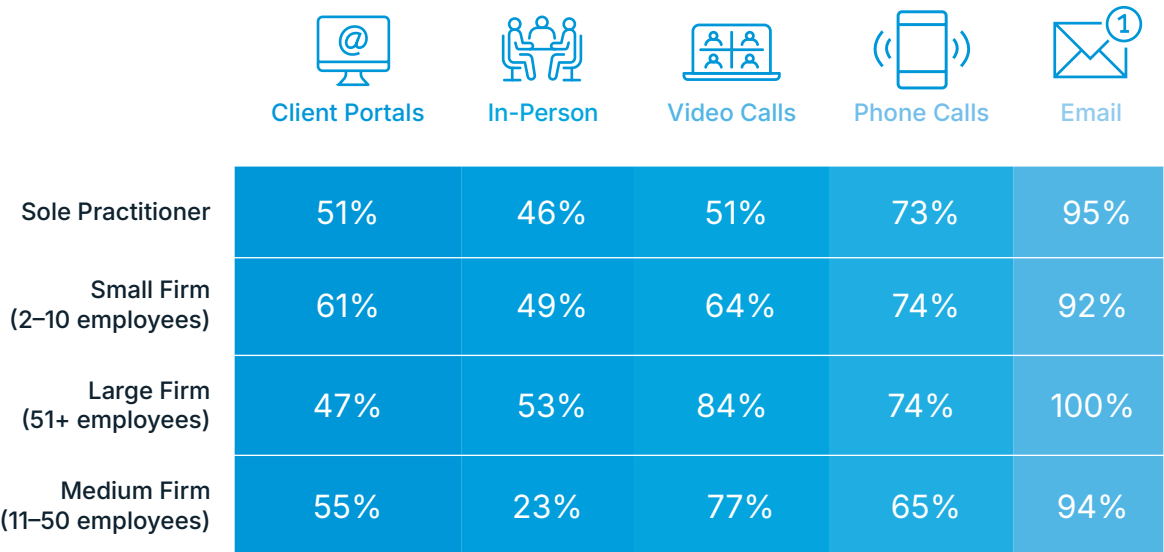
The takeaway? Firms aren't relying on just one way to communicate with their clients.

They use various tools to meet their needs and move engagements forward. Leaning on multiple communication methods allows firms to meet clients where they are, encouraging stronger relationships. It also helps accounting firms explore more efficient ways to request and share information, e.g., via client portals. Too many tools and strategies can have risks, though.

**If there isn't a clear plan for managing them, firms may run into workflow obstacles, such as difficulty tracking information, project delays, and redundant processes.**

# Tools used for communication vary by firm size

## How different tools are used among firm sizes



We found that email remains a core communication tool regardless of a firm's size, with near-universal use among accountants. Phone calls are also widely used (73%) among firms of all sizes, indicating that sometimes a more personal touch is needed.

Client portals are most popular with small (61%) and medium (55%) firms but see lower adoption among larger firms (47%).

Similarly, small and medium firms have a marked preference for video calls over in-person meetings, with 64% of small firms and 77% of medium firms relying on video calls, but only 49% and 23% (respectively) sharing that they used in-person meetings.

This suggests that small and mid-sized firms may have shifted towards virtual collaboration as they look to maximize the resources and efficiency benefits of these tools.

In contrast, while larger firms frequently use video

calls (84%), they have the highest percentage of in-person meetings (53%) reported, emphasizing the value of more traditional, personal interactions. This may reflect the need for both a personal touch and faster data collection, as well as the diverse service client needs of larger accounting firms.

Compared to larger firms, solo firms depend most on direct communication methods such as email (95%) and phone calls (73%). These tools are straightforward in managing client relationships and don't require significant technological overhead.

However, solo firms demonstrate a lower adoption of video calls (51%) and portals (51%), which may correspond to more limited resources. Solo practitioners balance this with in-person meetings (46%), emphasizing personal engagement to strengthen client relationships. With communication tools becoming more accessible, these numbers could shift in the coming years.

# MANAGING CLIENT NEEDS

the balance between communication, collaboration, and efficiency

Considering the experiences, tools, and demographics of the surveyed accounts, we were interested in the key issues they faced and how these might affect client relationships, efficiency, and profitability.

Despite positive feedback on their working relationships and communication, the survey participants raised significant concerns when asked about their challenges.

## What are the biggest challenges you face when working with clients?



Their responses showed that firms struggle with overarching communication, technology, and document management issues.



The biggest issues reported were **scope creep (64%)**, **timely document collection (69%)**, and **setting client expectations (46%)**. Document management is also a persistent issue, with **39%** noting difficulties streamlining this process.



These inefficiencies can occur when firms rely heavily on manual processes, such as email exchanges, which increase touchpoints and slow down project timelines.

Furthermore, 23% of respondents indicated challenges with technology integration, highlighting how disconnected systems can compound communication barriers and contribute to scope creep and unmet deadlines.

The data suggests that firms aren't dealing with isolated challenges but rather interdependent ones. For example, unclear expectations lead to scope creep and delays, which frustrate clients and accountants.

Conversely, while technology integration has the

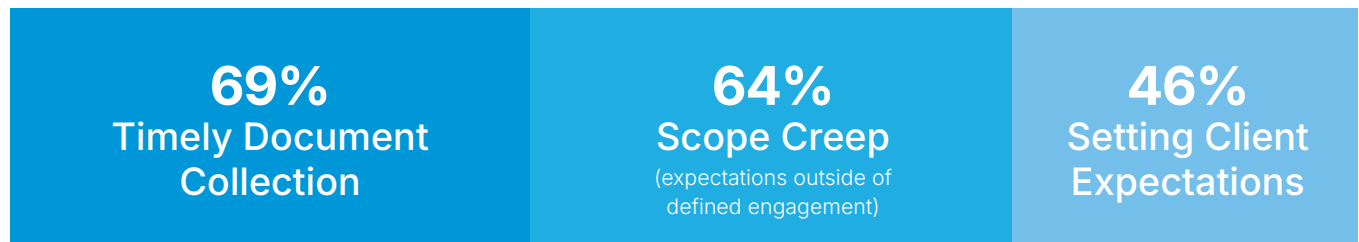
power to eliminate communication barriers, when it isn't well implemented, it can magnify existing issues with data collection and client satisfaction.

The bottom line? When communication breakdowns, unclear expectations, and technology gaps collide, they can have a direct impact on:

- Achieving efficient and profitable processes
- Meeting client expectations
- Managing client data
- Avoiding compounding problems
- Streamlining client services

Below, we examine these issues more closely to understand their impact on client communication and collaboration.

## | Poor communication increases scope creep and project overruns



Many of the top challenges (document collection, scope creep, client expectations) point to issues with client onboarding and clearly defined processes, as well as barriers created by disconnected or poorly implemented tools.

Without client training, effective processes, or well-implemented tools, firms risk wasting valuable billable hours while struggling to maintain clear communication with clients

These issues can result in a significant impact on overall profitability and efficiency, with firms seeing:

- Lost revenue from unbilled or overrun hours

- Strained client relationships due to unmet expectations or missed deadlines
- Lower staff productivity as resources are diverted to managing issues that could have been prevented with the proper planning and systems in place

For accounting firms, anything that decreases efficiency and profitability is something to be mindful of. As accountants navigate tight profit margins, shifting expectations, and regulatory complexities, there is less room for error than ever. Additionally, the shift toward advisory services and value-based pricing could amplify the need to find new ways to streamline operations.

## Late document collection disrupts workflow and client engagements

Of the respondents, they had issues:

**69%**

Timely  
Document  
Collection

**39%**

Streamlining  
Document  
Collection

We found that document collection is a major challenge for accounting firms, with 69% reporting delays in collecting necessary documents and 39% struggling to streamline the process.

These issues affect more than efficiency—frequent delays and back-and-forth with clients can disrupt timelines, strain communication, and make work harder for everyone.

Why are documents causing problems for accountants? Document collection issues may stem from the tools being used. For example, response timelines may lag if firms use email to gather documents rather than a secure file-sharing tool or a client.

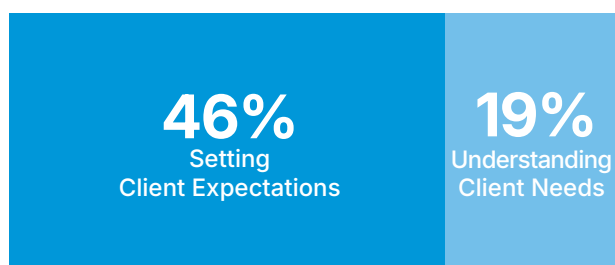
Another pain point that may be related is setting client expectations, which 46% of accountants struggle with. When expectations don't match up, process-related issues often follow.

**Reliance on manual communication creates room for error. With 23% of accountants reporting difficulties with technology integration, it's evident that disconnected systems can complicate client collaboration.**



## Setting clear expectations remains a major challenge

Of the respondents, they had issues:



While we found that scope creep is a pervasive problem, it's not the only issue accountants experience with getting on the same page as their clients. Nearly half of firms (46%) reported

difficulty setting client expectations, while 19% expressed challenges in understanding what their clients need from them.

How accountants approach communications may contribute to this issue.

Using multiple (and often unintegrated) communication channels—such as phone calls and email—can make consistent and organized communication more challenging, particularly during hectic times of the year, like tax season. Key details quickly get lost, creating confusion about priorities and deliverables.

When you compare the prevalence of phone calls and email to the relatively moderate adoption of client portals and video calls, this information suggests missed opportunities to centralize and streamline communication.

## Communication issues don't exist in a vacuum

Our findings show that firms aren't dealing with isolated problems—communication and collaboration challenges often overlap. For example, communication barriers and difficulties in streamlining document collection can directly impact the timeliness of gathering necessary documents.

A key area of overlap lies in technology integration. Although not the most reported issue, technology challenges (23%) can have widespread impacts. Of firms struggling with tech integration, they also reported:

- **Scope creep (75%)**
- **Delayed document collection (64%)**
- **Difficulties with client expectations (57%)**

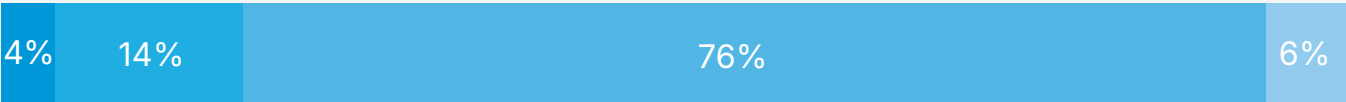


Depending on multiple communication channels without proper integration creates inefficiencies and client frustration, especially during high-demand periods like tax season.

## | Touchpoints required to do the job can be high

Frequent client communication isn't always bad, but when gathering information for an engagement, extensive communication can be time-consuming and eat into profit margins.

**On average, how many touchpoints does it take to gather all the required information to complete an engagement?**



10+      6-10

When we surveyed accountants, three out of four stated they needed between two and five touchpoints to obtain the required information.

With 69% citing timely document collection as their biggest challenge and 39% struggling to streamline the process, the high number of touchpoints underscores the need for accountants to address these issues.

2-5

One survey participant shared, "Keeping the number of touchpoints for our clients and ourselves in mind is key to success. There are so many distractions for business owners that we need to keep it simple."

1



**Of the firms that experienced communication barriers, how many touchpoints did it take?**



10+      6-10

We found a clear relationship between communication barriers and the number of touchpoints required to get sufficient client information.

These numbers highlight the impact of poor communication on efficiency. When firms

2-5

have communication barriers with clients, they spend more time chasing down information than focusing on their billable work. These inefficiencies are particularly problematic during tax season when deadlines are tight, and delays can snowball.

1



# FINDING THE RIGHT FIT

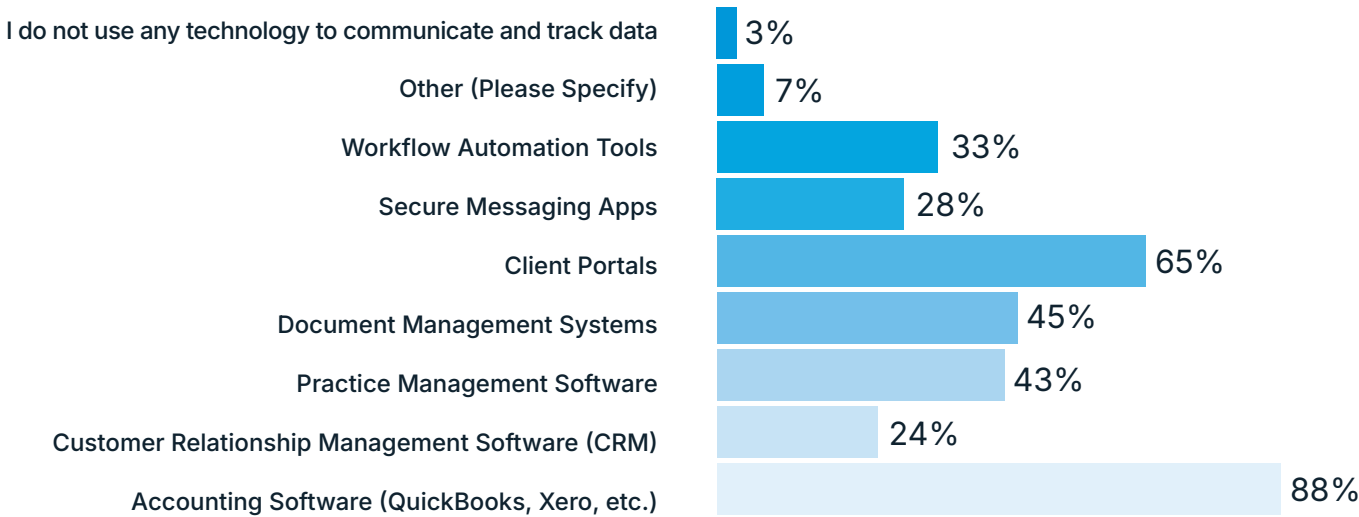
## what tools do accounting firms use to collaborate with clients

Technology impacts every aspect of business operations in the 21st century. With the widespread adoption of email, social media, and instant messaging, its mark is especially evident in how we communicate.

To determine how the accounting industry has adopted communication technology, we asked survey respondents about the kinds of tools their firms were using and how it has impacted their ability to collaborate with clients

### Firms vary in their use of collaboration technology by firm size

#### What tools or technologies do you use to collaborate with clients?



We found that most accountants use accounting software (88%) and client portals (65%). Two other popular tools include document management systems (45%) and practice management software (43%). Only a small fraction of survey respondents reported not using technology to communicate or track data (3%).

Larger firms typically have larger budgets to invest in technology and are driven by the need for better operational efficiency due to their size. What's more, size speaks to more than overall client numbers. As firms become bigger, the more clients are handled per CPA:

#### Average number of clients per CPA:



This increase in clients underscores the role of collaborative technology in communication and document collection; with CPAs at large firms handling more than 500+ clients per tax cycle, the right tools are vital to successful communication and efficient workflows.

Another factor behind a greater need for more sophisticated workflows in large firms: the number of individuals involved per CPA

On average, CPAs in large firms had 3.4 people interacting with their service process per workspace. Small firms have 2 per workspace. This means more communication and more engagement with documents to finalize work products.

The survey results highlighted this, with a higher adoption rate of more complex technologies like workflow automation, CRM software, and document management systems compared to smaller firms.

The Mango user data also shows the same results, with a significant number of solo CPAs still not fully utilizing client portals or enhanced communication tools.

CRM software adoption remains relatively low across firms of all sizes, with just 42% of larger firms utilizing it, along with only 26% of medium firms and 28% of small firms.

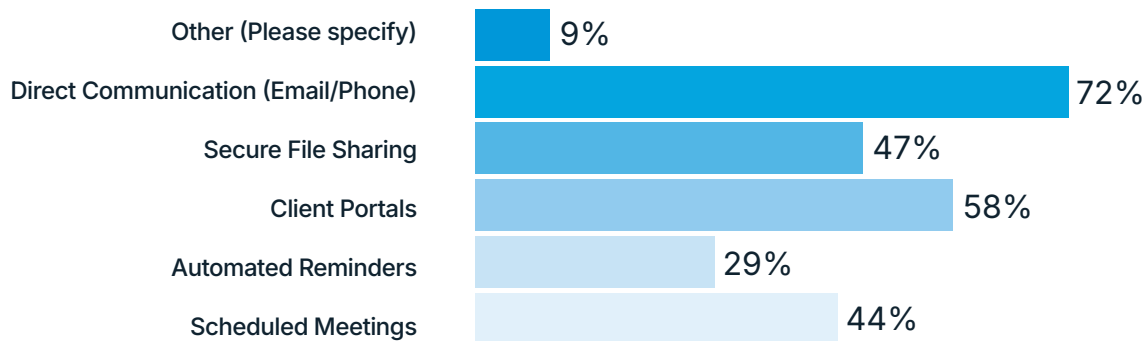


From the responses, it's clear small firms and solo practitioners lean heavily on core technologies like accounting software and client portals rather than advanced, integrated systems. When staff is limited, firms may not feel the need to invest in technology, but the benefits of these tools can sometimes be felt most profoundly in smaller teams due to their impact on efficiency.

## Gathering client data requires a clear strategy

We also examined how firms were solving one of the major issues in client communication: collecting client data. Gathering client information is critical in nearly every aspect of accounting but presents a particular challenge during time-sensitive situations such as tax season.

### What are your most effective strategies for gathering data from clients?

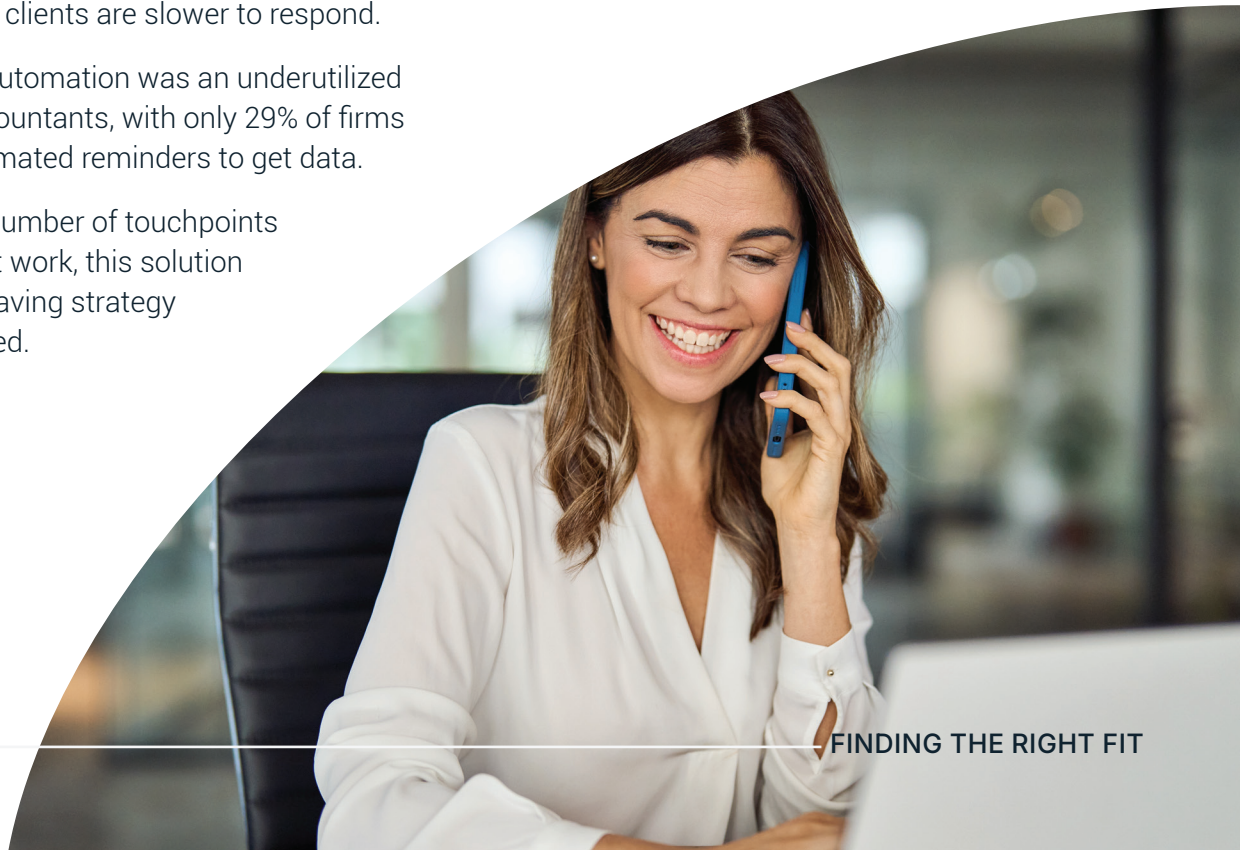


We learned that 72% of firms found a direct email or phone call effective for getting the information they needed from a client. While effective for maintaining a personal connection with clients, this can become time-consuming, especially when clients are slower to respond.

We found that automation was an underutilized tool among accountants, with only 29% of firms leveraging automated reminders to get data.

Given the high number of touchpoints reported to start work, this solution can be a time-saving strategy when fully utilized.

However, some technology is being adopted to solve the data collection issue. Fifty-eight percent of respondents found client portals effective, and almost half (47%) use secure file sharing.



# COMMUNICATION SOLUTIONS

## How accounting firms are solving their client communication problems

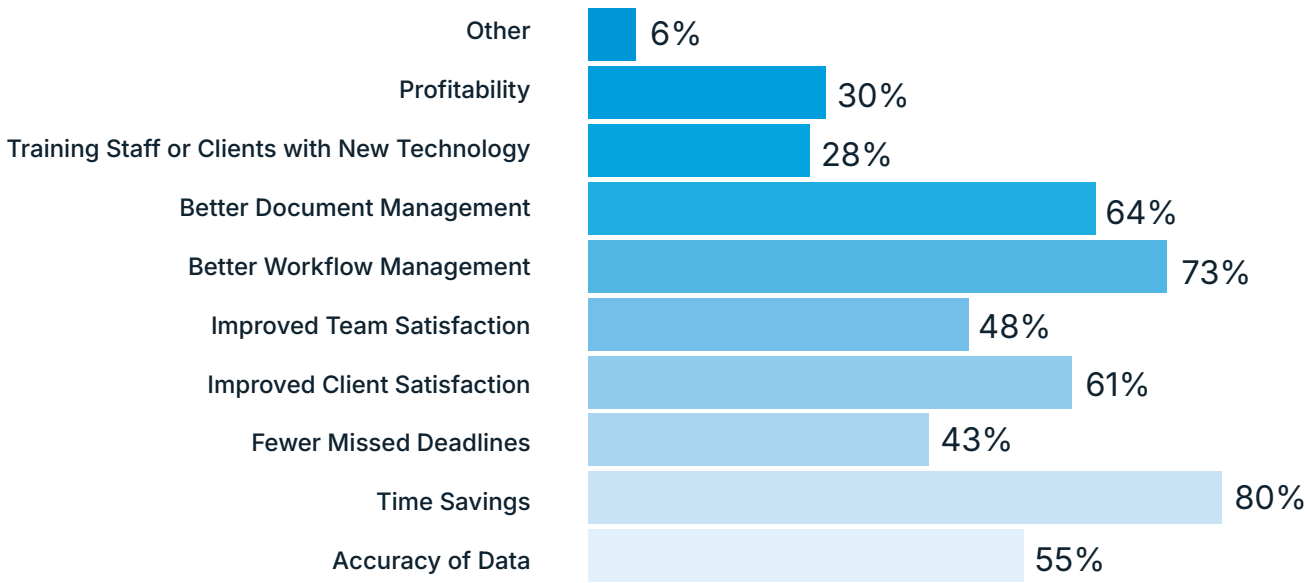
Given the complexity of client communication and the nuanced nature of the accounting industry, it's no surprise that challenges crop up. But how do firms approach solving them? Based on our survey responses, we observed several strategies at work.

### I Firms are leveraging technology & seeing success

We also examined how firms were solving one of the major issues in client communication: collecting client data. Gathering client information

is critical in nearly every aspect of accounting but presents a particular challenge during time-sensitive situations such as tax season.

### What success have you experienced using technology to assist with client collaboration?



For firms who reported using technology to facilitate client work, the benefits are clear.

When technology is implemented correctly and used across the firm, accounting firms can increase their efficiency across numerous points, from document management to meeting deadlines.

It's important to note that while time savings are reported at a high rate, only 30% of respondents









report profitability as an outcome. This suggests that while tech is essential, it's not a cure-all for communication challenges.

**We found that 80% of respondents reported time savings, 73% had better workflow management, and 61% saw improved client satisfaction when they leveraged client communication and collaboration tools.**



## Broad tech stacks can lead to higher satisfaction

### What tools and technology firms are using by satisfaction level?

	 I do not use any technology to communicate and track data	 Workflow Automation Tools	 Secure Messaging Apps	 Client Portals	 Document Management Systems	 Practice Management Software	 Customer Relationship Management Software (CRM)	 Software (QuickBooks, Xero, etc.)
Fair	0%	28%	30%	74%	30%	46%	14%	84%
Good	4%	32%	28%	63%	46%	45%	23%	88%
Excellent	0%	36%	23%	61%	55%	36%	35%	92%

For firms who rated their client communication as excellent compared to those who rated it as fair, 21% more used CRM software.

Firms with higher satisfaction and communication ratings also consistently used a broader range of tools, particularly CRM software, document management systems, and workflow automation.

It's not just client-related benefits—48% of firms saw improvements in team satisfaction.

To further support this observation, we found that accountants who rated their experience working with clients as neutral had limited technology adoption; these respondents used CRM systems very minimally (11%), compared with a 20% higher rate of adoption for very satisfied respondents.

**Accountants with the highest levels of client satisfaction use solutions like document management systems (55%), workflow automation tools (36%), and CRM software (35%).**

In short, smooth communication, efficient document management, and clear processes benefit everyone.

It's important to note that having the technology is part of the solution, but teams must also be clear about how they're using it. In an interview conducted as part of the survey, we spoke with Jeffrey Phillips, CEO of PADGETT, who works with a wide range of accountants.

As he put it, "Its success isn't just technology, but also a mindset of deciding when work needs to get done and the rules in place for that work to be delivered to the client with clear boundaries."

## Integration and automation translate into efficiency

Of course, the tools themselves don't determine the overall working experience. How they're used and the features leveraged play an essential role in making a solution work well.

To this end, we noted that integration and automation can determine efficiency and effectiveness.

The higher adoption rate of these integrated tools allows firms to see the benefits of better organization, automation, and data accuracy, which directly translates into better client experiences and a higher-quality working environment overall.

Those who rated their level of communication as excellent had the highest adoption rate of document management systems and CRM software, indicating the importance of organized data.

Combined with the 41% who use automated processes to improve operational efficiency, firms adopting this technology reduce the time spent on manual tasks. With more time to focus on high-value work, firms can be more profitable or add on services such as client advisory and financial analysis.

## Accounting firms are focusing on updated client communication strategies and client training

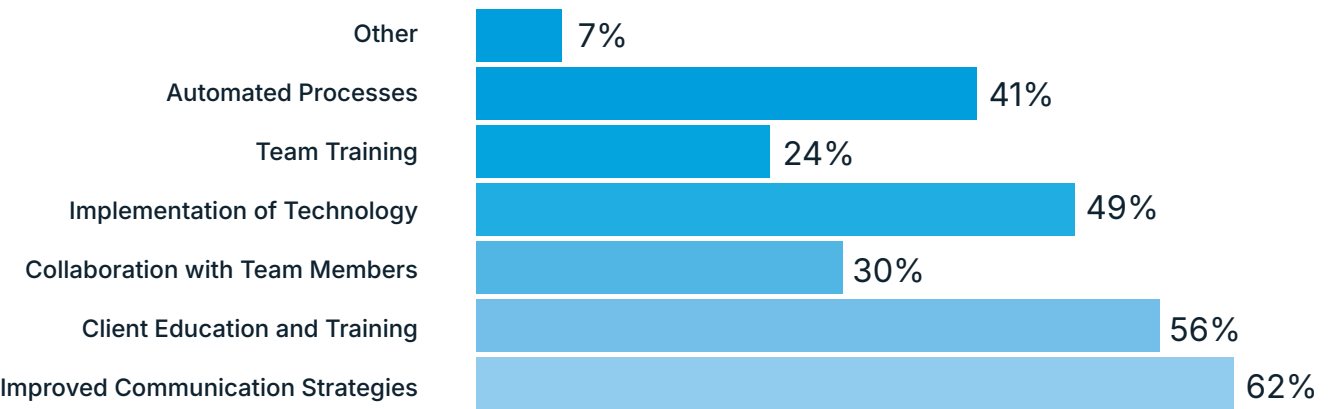
Most firms focused outwardly, looking to improve client collaboration through client education and training (56%) and updated communication strategies (62%).

Conversely, fewer respondents focused on improving internal practices. Twenty-four percent of respondents said they provided team training,

and 30% worked on improving team collaboration to address client communication issues.

Still, sometimes solutions may need to address both concerns for both sides. As one respondent said, "I think sometimes it comes down to having patience and understanding. Sometimes, slowing down the conversation and making sure everyone is on the same page requires patience and space for you and the client to grow."

### How do you address these challenges?

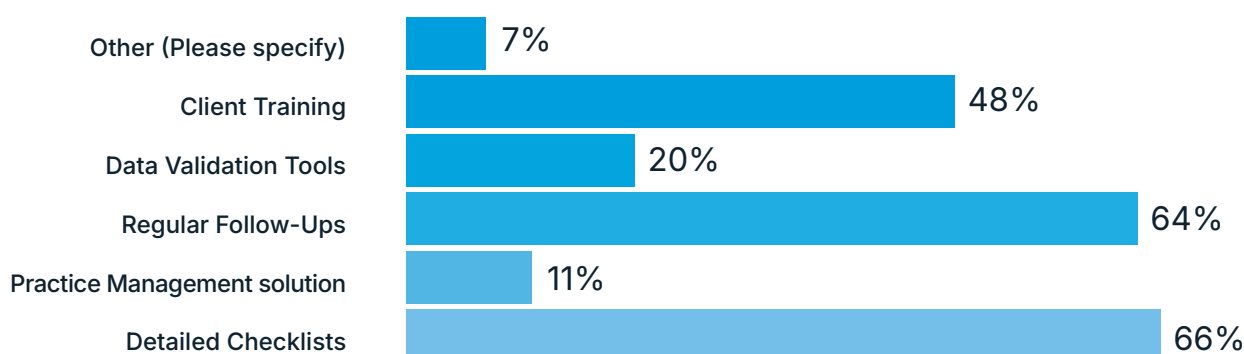


## Gathering data is still a hands-on process

Data collection concerns aren't just about getting the information in hand. Accounting firms need accurate and complete data to do their jobs properly.

According to our survey participants, firms use numerous methods to ensure they're getting everything they need. The majority use detailed checklists (66%) and regular follow-ups (64%). Forty-eight percent also reported relying on client training.

### How do you ensure data accuracy and completeness from clients?



We were interested to see that only 20% leveraged data validation tools, and 11% used practice management tools, the only two technology-based methods listed.

This indicates a preference for using hands-on strategies to check for information accuracy and completeness. These methods can require considerably different time commitments. From an efficiency standpoint, opting into tech can ultimately reduce the need for manual follow-ups and ensure all items are received.



# MEASURING SUCCESS

## how firms are gauging client communication

As the saying goes, “What gets measured gets managed.” When tracking metrics in communication, firms that take an active approach are in a better position to identify issues and implement improvements.

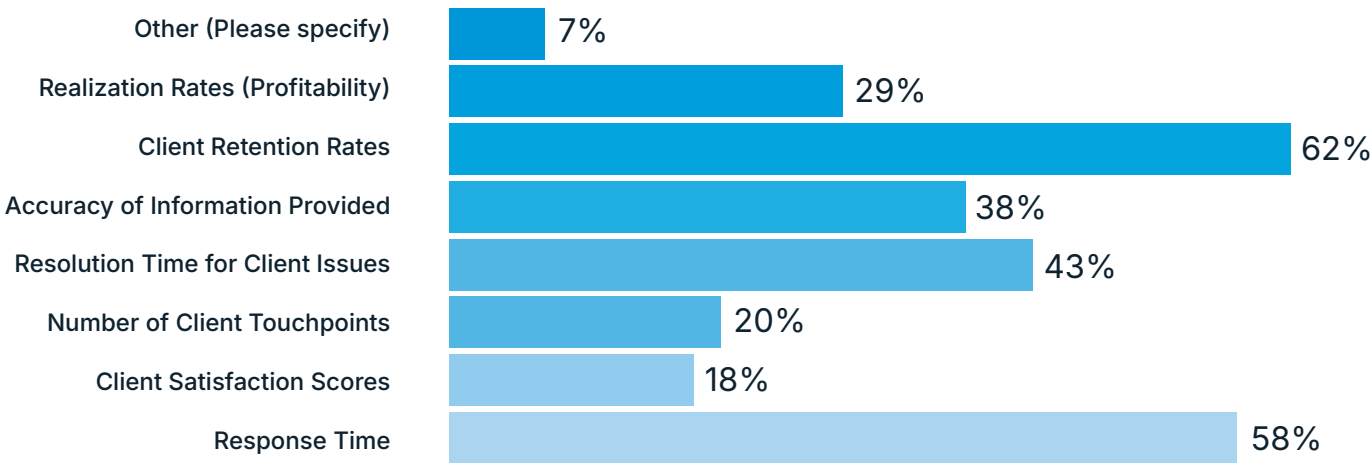
So, how are accounting firms measuring their client communication?

We found that accounting firms did not have widespread, consistent metric tracking strategies in place. While many metrics are tracked, they don't necessarily translate into regular review schedules or help drive business decisions.

## What firms track and what they miss: breaking down accounting firm communication metrics

We also examined how firms were solving one of the major issues in client communication: collecting client data. Gathering client information is critical in nearly every aspect of accounting but presents a particular challenge during time-sensitive situations such as tax season.

### What metrics do you use to gauge successful communication with clients?



We observed that the most common metrics tracked indicate that accounting firms are measuring client relationship management. Sixty-two percent of respondents say they track client retention rates, 58% monitor response time, and 43% monitor resolution time for client issues. These findings indicate that accounting firms prioritize strengthening client relationships.

However, fewer measure metrics tied to operational efficiency, such as realization rates (29%) or the number of client touchpoints (20%). This suggests that while maintaining client relationships, they may overlook how communication inefficiencies impact profitability and workflow.

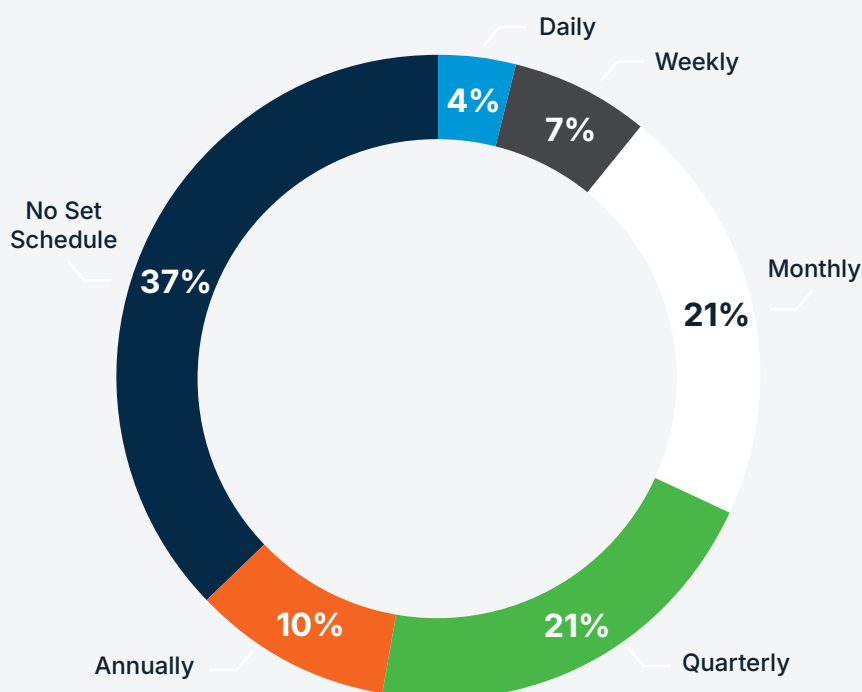


The limited use of client satisfaction scores (18%) also reveals a gap in connecting the dots between communication quality and the overall client experience. Firms that track communication metrics with business

outcomes—like profitability and scope management—are generally better positioned to minimize scope creep, create efficient workflows, and effectively collaborate with clients, particularly during tax season.

## Measuring but not managing: are firms looking at their metrics enough?

**How often do you review these metrics?**



Metrics are only as impactful as the frequency of their review. Reviewing metrics is essential for sustainable business operations, yet according to our survey respondents, it often falls by the wayside.

While 21% review monthly or quarterly, many still operate without regular oversight. Thirty-seven percent of firms don't follow a schedule for reviewing metrics, and 10% only check in on their numbers annually.

## Relationships alone may not drive growth: the case for metrics that align profit and communication

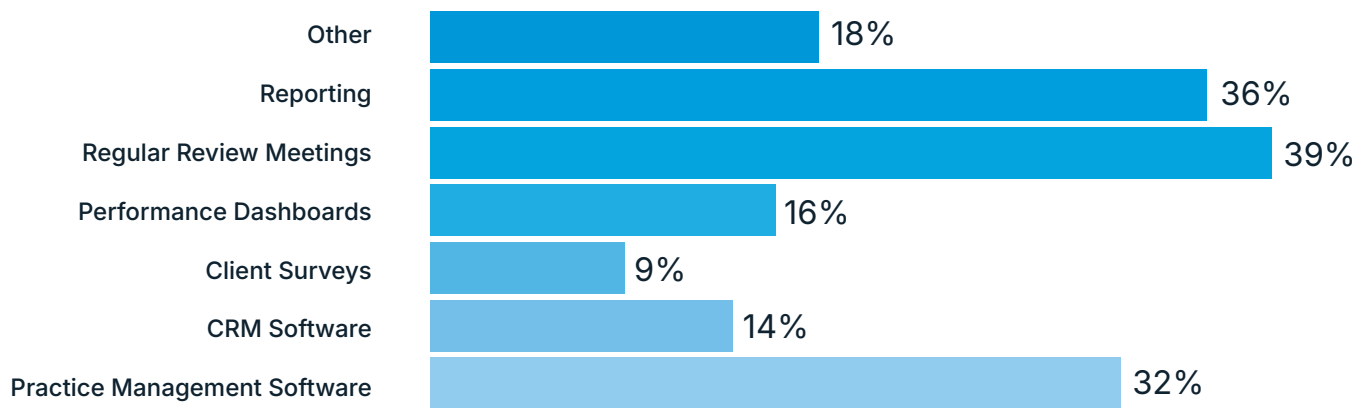
The results reveal that firms often measure client retention, response time, and issue resolution when evaluating communication. Retention rates receive the most attention, showing that maintaining long-term client relationships is a focus for many firms. Response time and resolving client issues are also common focal points.

However, relationships are only part of the profitability puzzle. Far fewer firms monitor realization rates or client satisfaction scores despite the direct impact these metrics have on financial performance and service quality. Only 29% of firms track realization rates. This suggests that many firms are not actively monitoring communication metrics that directly impact financial health.

## Hands-on vs. digital: what firms are using to track communication success

Today's digital tools make it easier to track data, offering greater access to insights. Yet, with all the software at accountants' fingertips, we were surprised at what our survey participants shared.

### What tools or methods do you use to track these communication metrics?

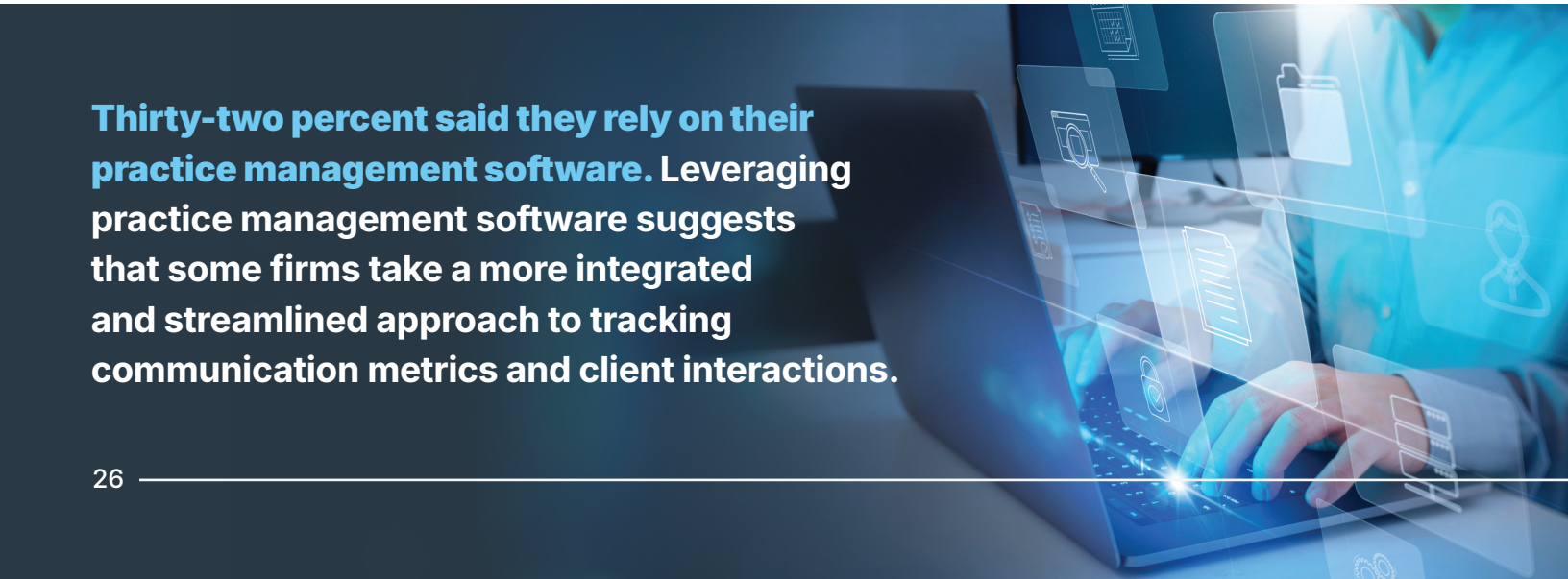


Out of all the options, the greatest percentage (39%) of respondents shared that they relied on regular review meetings to track communication metrics. Although this doesn't exclude other tools, it indicates that internal collaboration plays an important role in evaluating numbers and decision-making.

Thirty-six percent of respondents use reporting tools, but others offer more detailed insight.

A centralized system automates data collection and reporting, saving time and ensuring accuracy and consistency. This helps firms gain deeper insights into client communication, leading to more informed decisions and better client relationship management.

**Thirty-two percent said they rely on their practice management software. Leveraging practice management software suggests that some firms take a more integrated and streamlined approach to tracking communication metrics and client interactions.**



# YOUR NEXT MOVE

## insights for stronger communication and collaboration

Accounting firms must manage tight deadlines, client questions, and compliance requirements while keeping things running smoothly. Managing these obligations requires strong communication, but as this report shows, it's a persistent challenge.

### Communication breakdowns slow everything down

Scope creep is one of the biggest problems accountants face, with 64% of firms dealing with projects that expand beyond the anticipated engagement. And it's not just scope creep—delayed documents and missed expectations also create major roadblocks.

When accountants don't set clear parameters, firms must scramble to meet deadlines, keep clients happy, and avoid unbilled hours.

### Technology saves time and keeps things on track

Firms that embrace tech aren't just surviving—they're thriving. Tools like client portals, workflow automation, and document management systems reduce busywork and make collaboration smoother.

For firms still not using key tools like CRM software or automated reminders, these tech solutions can help them manage time, energy, and resources more accurately.

### Keeping tabs on the right numbers helps you course-correct

Some firms focus on client retention and response times, which is great. But tracking financial metrics, like realization rates, can make a big difference. If you know what's working (and what's not), it's easier to adjust before things get out of hand.

### Simple steps to make things easier

Ready to dial things in before the next busy season hits? Here's where to start:

- **Lean into tech.** Set up client portals, automate reminders, and use CRM software to keep everything organized.
- **Set expectations upfront.** Use check-ins, timelines, and written agreements to avoid scope creep.
- **Track what matters.** Monitor realization rates and the number of touchpoints required to wrap up projects.
- **Prep now for tax season.** Make adjustments now so you're not scrambling when things get hectic.

Bottom line? Communication struggles don't have to slow you down. Take action now, and you'll be well-prepared for the next fiscal year (and tax season).