Now is the time for calm, controlled and caring client calls. And lots of them.

Following Paul Shrimpling's webinar **'How to best help your clients through COVID-19,'** we've listed below a few additional processes that can help you move from reactive to scheduled client care calls and video meetings:

1. **Have calm, collected, controlled and caring conversations** - remember to make your client calls/videos balance:
   - ❑ finances and feelings;
   - ❑ cash and goodwill;
   - ❑ business and personal

2. **Quickly get your client contact campaign working** over the next 10 weeks (then 20 weeks) to ensure personal voice/**video** contact is made with all clients – create a tiered approach according to client importance and pressing issues – allocate diary time specifically to **scheduled** client calls – 15 minute calls, 30 minute calls and 45 minute calls depending on need and client complexity/importance – use call forwarding on your mobile to team members to answer for you and book calls into your diary slots can be seen as positive client care (avoids the need to listen to messages and call back when the calls can be scheduled) – Put team to work scheduling calls or getting clients to access your covid-19 help documents and videos

   Script to help team book/schedule calls with clients:

   Dear [client name]

   I know you are worrying about the security of your business, making payroll, staff, supply chain, and cash flow.

   To help you navigate this, can we please book in a 15 minute courtesy call as soon as possible?

   We just want to see how you are, answer any questions you have and see how we can help you further.

   You've almost certainly got questions about future cash flow, current risk areas and immediate tactics/ government relief that you may benefit from immediately. It's why we want to check in with you.

   Contact Ben or Sarah to book a call on telephone XXXX XXX XXXX or email them at sarah@mmm.co.uk ben@mmm.co.uk

   OR

   Please follow this link to book a day/time for us to talk - (if you use Calendly)

   I look forward to checking in with you

   Paul

NB Some clients will respond others will not. Keep track of those that do not and get your team to actively call them to book a call/video call with you – be serious about this to be sure you get to everyone.

This script was inspired by some resources shared by Futrli – you can get more useful insights from them here - https://cdn2.hubspot.net/hubfs/5103487/Downloadable%20Assets/COVID-19%20Accountant%20Strategy%20Futrli%20%20doc%20(1).pdf

3. **Use agendas** to ensure your calls/videos use the time with clients effectively. It's so hard to wrap a call up with a client in a caring and respectful way – but it can be done. Signpost the length of the call at the start and suggest another call as you'll see in the scripts below. The use of the *"Is that ok with you?"* question in section 2 below, helps your client commit to the time of the call and the next call.

15min video meeting agenda:

1. **Start the call well – the human touch**
   - ❑ *"How are you holding up?"*
   - ❑ *"How's your family?"*
2. **Set the time frame of the call**
   - ❑ *"We have 15 minutes then I'm committed to…"*
   - ❑ *"But let's make sure we schedule another call when we've done."*
   - ❑ *"Is that ok with you?"*
3. **Focus on one subject:**
   - ❑ *"Tell me what should we talk about first?*
     - *Team issues*
     - *Customer issues*
     - *Cash issues*
4. **Agree on decisions and actions**
   - ❑ *"What was most important for you on this call?"*
   - ❑ *"What's your next step or key decision?"*
5. **Agree time for next call – give them a choice**
   - ❑ *"Let's speak again soon – would you like to hook up again on Friday or would next week suit you better?"*

45min video meeting agenda:

1. **Start the call well – the human touch – ask about them and their families**
   - ❑ *"How are you holding up?"*
   - ❑ *"How's your family?"*
2. **Set the time frame of the call**
   - ❑ *"We have 45 minutes then I'm committed to…"*
   - ❑ *"But let's make sure we schedule another call when we've done."*
   - ❑ *"Is that ok with you?"*
3. **Team challenges**
   - ❑ *"What health issues have your team seen?"*
   - ❑ *"How have your team responded to things?"*
   - ❑ *"What hygiene protocols have you set up?"*

- ❑ *"How are you making remote working work?"*
- ❑ *"What have you done about reduced hours?"*
- ❑ *"What are you planning next for your team?"*

4. **Customer challenges**
   - ❑ *"How are your customers reacting?"*
   - ❑ *"What's happening with customers and revenues?"*
   - ❑ *"What more are you expecting?"*
   - ❑ *"What have you done to look at future sales*?"

5. **Cash challenges**
   - ❑ *"What are your thoughts on managing cash?"*
   - ❑ *"How far ahead are you looking/planning?"*
   - ❑ *"What are you expecting to happen?"*
   - ❑ *"How will it impact you personally?"*

6. **Agree on decisions and actions**
   - ❑ *"What was most important for you on this call?"*
   - ❑ *"What's your next step or key decision?"*

7. **Agree time for next call – give them a choice**
   - ❑ *"Let's speak again soon – would you like to hook up again on Friday or would next week suit you better?"*

2. **Get a flow (campaign 2 or 3 a week) of emails** to clients that share practical help and sources of information. Also get Covid-19 info live on your website – for messages you find yourself repeating with clients it makes sense to capture video messages on these subjects and post on your firm's YouTube channel – and get your team to use these with clients when they have 'triage' calls – here's how two firms are updating their website re covid-19 - https://www.hallidays.co.uk/views-and-insight/blog/coronavirus-live-support - http://www.lmca.co.uk/covid-19-hub

3. **Give clients a longer-term perspective not just reactive management at this time – 10 weeks; 20 weeks; 30 weeks.**