

Must Be The Annual "Let's Send Them Everything We've Got" Mailing...

Funny but true.

A few years ago I was just starting to work with a 30ish person firm that, ironically, performed the audit for an organization who employs a good friend of mine formerly of the CPA world.

My friend dropped the bug in my ear that the audit engagement partner wasn't very service oriented. He didn't call or touch base very often. And, in fact, when Partner was asked by my friend to NOT give the standard financial statement presentation to the board, but to go into more conversation about what the implications of the numbers were, Partner simply gave the standard presentation anyway.

My friend wasn't too impressed. He told me about it so I could try to clue the Partner in to some flaws in his service skills.

Sadly, my anonymous report fell on deaf ears and was met with protests of denial that it was a valid issue. If only they'd known how big and influential a client this is... Ironically, Partner thinks he's an amazing marketer.

So a few weeks later (December time frame), I received this email from my friend...

I need to correct my comment to you the other day about the lack of outreach from Partner. In yesterday's mail I received a fat envelope from Firm.

It's fun to look at packages like this from both a client perspective as well as a marketing consultant perspective (which probably isn't fair, but it sure is interesting!) I thought it would be fun to give you some anonymous client feedback for you to consider as you help them.

The white envelope had a 1" x 2.5" white label in the return address area placed sloppily in the corner with Firm address info. It looked a little cheap that they did not have envelopes printed with their information on it. In the envelope I got:

- * A xeroxed "Dear Valued Client" letter confirming the understanding of the terms and objectives of the engagement for services related to computer software consulting services. As far as I know, we are not engaging them for that service.

- * A xeroxed "Dear Valued Client" letter confirming the understanding that they will prepare our 200X federal and state income tax returns. As far as I know, the CPA who does our books will be doing that.

- * A 2-page xeroxed document that describes "Internal Control." There is no indication on page 1 that this is a Firm document - on the bottom of page two are addresses and an invitation to visit the website - the first indication of who this document is from, but still nothing that names the firm directly.

- * A 1-page xeroxed copy of a Company Car Lease Value worksheet to help with the preparation of W-2s. I assume this would be for us to fill out and return to them if they were doing our W-2's, but they are not, so I'm not sure what to do with it.

- * A 2-page xeroxed paper entitled "COOP - Disaster Relief." It's got some good information, but no indication anywhere that it is from Firm.

- * The December 200X Business Pension Update newsletter. Looks pretty good, but leaves me wondering where the January - November issues have been.

- * The December 200X Business Year End Update. Also makes me wonder where any January - November issues have been.

- * The 200X Annual Tax Planning Letter - looks good. Must be a PDI piece...

- * Firm Technology Solutions tri-fold brochure

My initial reaction to this package was that it must be the annual "lets send them everything we've got" mailing.

I was expecting the package to include information on our upcoming audit next month. That was not there but everything else was.

I'm sending you all of this as much for fun as anything else. Just thought I'd share this with you as an additional area to help them with - now I've got to get back to work!

I'm not posting this to embarrass anyone, but to spare other firms from creating similar impressions. Is it possible your firm has done any of this?

QUICK LIST OF DOs and DONTs

DO listen to your client's specific requests (even if you think the person asking isn't the key decision maker)

DO reach out to your clients regularly in a personalized, non-generic way

DON'T send an impersonal letter that starts off with "Dear Valued Client" -- It looks like you don't care. Either do the darn mail merge to personalize the salutation, or send the info in a newsletter or other format not intended to be individually addressed.

DO send only relevant information pertinent to the services that particular client buys. If you send additional information, preface it with what else you are sending and why "this may be applicable to you this year so let's discuss it..."

DON'T send engagement letters or forms for services never before discussed with the client

DO make sure you're not passing on an inconvenience to your client that you should bear yourself. Being too busy to filter what you send is lazy and inconsiderate. Wasting their time to filter information, item by item, to discern if they are supposed to do something with it, teaches them something: what you send is not always

important. Next time you send something, don't be surprised if they don't open it.

DON'T think that your client will ever be impressed by "quantity" over "relevance."

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