clarity.

Lockdown 3.0 COVID Care

the steps required to help your clients to survive and thrive

- Triage your client base
- Quick check-in with all clients
- Follow-up with agreed actions or to those who don’t respond

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You've been here before. Throughout the various lockdowns, accountants all over the world have stepped up and been the unsung superheroes of the business world. It's possibly been completely overwhelming at times. But here we are again. Lockdown 3.0. Nothing has changed, you can do this just as you did before. This guide is here to help you make it as easy as possible for you.

As accountants, we have the inherent abilities and all the necessary skills and training to support small businesses in their time of need. It is important to contact all of your clients once more. It would be easy to assume that they've got through this before and can get through it again. But the majority will be feeling uncertain, fed up and in need of at least a conversation with their trusted advisers.

However, to ensure that we can contact ALL our clients effectively and efficiently, whilst offering valuable advice and support, we need the right combination of people, process and technology.

You have the people and we have built the processes and technology for you.

Now, we really don't mind what technology you actually use, what I do care about is that you provide support to all the small business out there that need your help!

Our solution (leveraging technology together with the necessary systems and processes) and our combined experience of the worlds of small business and accounting, enable your firm to protect and engage with every client, supporting them through the challenges of today and into the growth of tomorrow.

Please feel free to use this guide together with the detailed implementation plan and adapt as you see fit - you can of course substitute scripts, processes and technology!

But, If you want to roll it out-of-the-box, then we are confident that this easy to use step-by-step plan will make a difference. Be sure to get all your team involved and this guide will help you do that.

Business isn't one dimensional. Obviously your advice shouldn't be either. Whilst cash is vitally important, there are so many other elements to consider.

We hope that you, your family team and loved ones are safe and well. And remember to look after all of them too and, of course, make sure you take time out for yourself!

Team Clarity

our 3 step guide

We have created a 3 step process for you so that you can quickly deal with all your clients, using a systemised approach, and can provide further help and support to those who will undoubtedly need it. We have also written this so that you can get all you team can involved.

All clients, who have the potential to continue operations, to whatever extent, should be put through this simple 3 step process.

The detailed implementation plan and system notes for your firm (including example emails and agendas) are set out in the accompanying notes and these notes also provide details on an alternative process for those businesses who are completely shut down by the coronavirus.

1 what you can do today

You need to treat your portfolio in the same way a paramedic would deal with carnage following a multiple car accident on the motorway. It is essential that you **TRIAGE**, that is identify which of your clients are in critical condition, those that are serious, and those there are stable (for now). This process is not about size of business or importance of client to your firm. Every client needs you to help them and to do that you need prioritise those who are most critical.

Establish these facts immediately. It is the most important thing you can do for them but also for your business. During this economic environment, there is no such thing as business as usual, you are likely doing this already, but if not, put non urgent compliance/admin to the bottom of the list. Protecting your clients is vital for your business and theirs.

This is what we suggest you do immediately:

Get in contact with every client

To be done at scale and, to quickly connect with every one of your clients, we suggest that you use email. Most people are working from home and so trying to track them down via office phones/mobiles will be much harder and you have no time to waste. However, they need to hear from you. Many of your smaller clients will be on their own and even those with teams are now isolated at home.

Do not underestimate the psychological trauma many of them will be experiencing and the relief you will provide by reaching out. If you use Calendly or similar, put a link to your calendar booking tool at the bottom of the email, if not encourage a response by reply. See the detailed systems notes for example emails.

Accept that it is NOT business as usual

This email might prompt an immediate response from many of your clients. Expect many of them to want to book in. However, if they do not, you may need to proactively chase them. Particularly those that you have identified as critical. To manage this, you and your teams must clear your calendars for the foreseeable future. Your priority is to risk assess your portfolio of clients and protect as many of them as you can. Keep a record of those that have booked and have not. Follow up with those that haven't responded on the phone. Be persistent. Remember this is not business as usual and no one expects it to be, your clients need you to do this for them, so manage expectations of other work that has been scheduled, or being postponed.

NB. Many firms we work with do not have a database or CRM system in place. Now is not the time to tackle this but you will need to record the conversations that you are having. You can use Clarity's Portfolio View as a substitute and use the firm data tags to identify the levels of triage.
Alternatively, a simple spreadsheet will do just fine for now. Download **this template** if you are not sure of where to start. Don't rely on your own memory or that of your client's at times like this.

2 action planning call

You will need to prepare for this call - see the implementation plan. This preparation should take no longer than 15mins. Skipping step 1 is not an option if you want to speak quickly with ALL your clients.

The purpose of this 30min call is not necessarily about long term solutions. It's to ask questions, set actions and gather enough data to assess where they need your support most.

However, where appropriate offer help and support and answer their questions and allay their initial concerns. Remember, your clients may take the opportunity to offload/vent. Acknowledge but try not to indulge and bring the conversation back to the agenda.

Make sure you document any agreed actions - what the client will be doing and what you have agreed to do. Send out a simple who/what/when summary after the meeting together with the date and time if there is to be a follow up strategy meeting.

3 follow-up

If some of your clients were unresponsive to your first contact, do not assume that it means they do not need your support. Particularly if you have highlighted them as 'critical' based on their key numbers, be more specific about what more support they might need and why.

Try a different way of engaging. Pick up the phone, record a video. Remember they may have their head down in their business or be worrying too much to respond. You could be just the support blanket they need.

If they were responsive and you held your first action planning call then, all actions agreed during the action planning call (and any meeting going forward) must be shared. Note down all actions during the meeting so that they can be easily acted upon after the call. But also get in the habit of following up any meeting with an email confirming outcomes ie a who/what/when list. It will reinforce you being in control and saves time meeting to meeting. This email should include all actions agreed, who is responsibility for them and the timescales for them to be completed.

NB how you charge for this after the initial free call is up to you. However, we do not advise charging for this service at this point. It is in your interest to make sure they get through this challenging period.

Always schedule a follow up meeting, things are moving too quickly for you to not stay in control. Monthly at the very least but more frequently for those clients in really tricky positions would be hugely valuable. These meetings will also get your client into the habit of talking to you about their business and this will continue once this current situation has passed. They can be 15 minute Zoom calls - be time efficient.

Don't forget the detailed implementation plan and system notes accompanying this guide!

our promise to you

We will help you so that you can help your clients.

Time is critical. We will make it very easy to get started. No certification, no big training manuals, just simple focused support so that you will be able to action everything in this strategy, quickly and at scale.