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Help Us Help You: How Clients Can Contribute to Engagement Efficiency

By Bill Jenczyk

While service is always our top priority at DGC, it's also a partnership. We rely on client communication and information in order for us to do our jobs. What can you do to make your experience with your CPA less stressful and more efficient? Here are a few simple tips to help things go smoothly and possibly save you money.

Be punctual

If your work has been scheduled for a particular time, make sure that you have all of your information together and that you are ready to work with your DGC engagement team. Lack of preparation leads to delays and repetitive work, adding to the time and costs incurred on the engagement. It is much better to provide all of your information at the start of an engagement rather than piecemeal over the course of days, weeks, or even months.

Be prepared

If you are provided with an information request list, make sure that all of the items are ready before the engagement begins. Try to have all requested schedules ready, and if you have questions about your engagement be sure to ask. We truly appreciate your questions, and we are happy to work with you to make your engagement preparation as painless as possible.

Be thorough

If you are completing an organizer or questionnaire, make sure that you answer all questions thoroughly. Your answers to these questions may provide us with information that could lead to additional tax savings or planning opportunities, and they may also call attention to problems early in an engagement, allowing time to respond in as advantageous a manner as possible.

Be responsive

It is only natural for questions to arise over the course of an engagement. When your DGC representative contacts you for more information, respond as quickly and completely as possible. The longer an engagement is idling, the less efficient it turns out to be.

Here at DGC, we strive to provide excellent service to our clients, and your satisfaction is very important to us. Part of what makes our work rewarding is knowing that we have provided a high quality service to our clients, and it is our hope that these pointers will lead to a more satisfying experience for you. If you want to find out what you can do to make your experience with us both more efficient and more cost effective, contact your DGC engagement staff and ask.