

# Will A Client Portal Meet The Needs Of Your Accounting Firm? [Checklist]

Complete this checklist to determine whether a client portal could be a potential software solution for your accounting firm.

- ☐ Do you have 10 or more clients and/or employees?
- ☐ Do you have remote employees and/or clients located worldwide?
- ☐ Do you communicate with multiple clients and/or employees on a daily basis?
- ☐ Does your firm aim to provide excellent client care and communication?
- ☐ Do you regularly exchange e-mails with your clients and/or employees?
- ☐ Do you regularly exchange files with your clients and/or employees?
- ☐ Do you need to exchange multiple documents at once?
- ☐ Do your clients require on-demand access to their documentation?
- ☐ Do you require audit trails in order to track approvals and amendments made by your clients and/or employees?
- ☐ Do you require the ability to set up tasks for your clients and/or employees?
- ☐ Do you need access to a shared calendar for yourself and your clients and/or employees?

Based on the number of boxes that you've checked, will determine how appropriate a client portal solution will be for your firm. So, if you have ticked at least 8 of the boxes above, then a client portal may be a suitable investment for your accounting firm to make.

Clinked offers free demos, so if you are interested in finding out how Clinked could fit your individual needs, then request a demo today!

