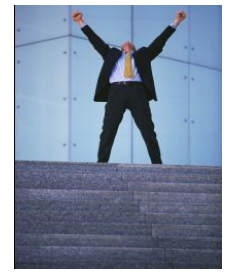


Missed or Overlooked Communications



Symptoms (Pain)

Causes (Diagnosis)

Best Practices and Recommendations

AWS Capabilities

- Client frustration; repeated calls are not returned within 24 hours
- No easy way to ask someone else to respond to the call
- Can't track billable fees for phone calls

- Too hectic/busy to return the call
- Hard to connect with client due to availability
- No capability to log and track phone calls
- Late on commitments; causes staff to avoid contacting a disgruntled client

- Staff logs all calls on hardcopy when speaking to the client. Record upon completion.
- All open calls are reviewed daily, prioritized and assigned
- Record all calls
- Track and manage in a centralized system

- Tracks the status of all communications
- Open communication dashboard
- Office manager can direct/assign staff to return calls. CPAs can leave guidance for staff to return the call.
- AWS tracks billable fees for all communications

Unreturned communications are evident on the Communications Dashboard. CPAs can return calls or leave guidance for the staff to return the calls.

AWS Home Screen Employee Dashboard

Accountants' Workflow Solution Dashboard

Run Dashboard For Demo Emp 1

Payroll & Taxes Accounting Services Notices Tax Returns Client Management All Modules

Administrative Tasks Communications Document Tracking Log

Communications Dashboard

Refresh

Craft, Mark	Caller	Mark	Credit Hold	<input type="checkbox"/>	For	DE1, DE2	Fees	\$0.00	Paid	
Date	11/2/2011	Time	11:41 AM	Phone	(410) 555-1212	Ext		Email		Response Not Needed <input type="checkbox"/>
Brief Message	Wanted to talk to someone about the notice he received.								Returned Call	<input type="checkbox"/>
									Completed	<input type="checkbox"/>
Macon, Darren	Caller	Darren	Credit Hold	<input type="checkbox"/>	For	DE1, DE2	Fees	\$0.00	Paid	
Date	9/28/2011	Time	11:40 AM	Phone	(443) 555-6767	Ext		Email		Response Not Needed <input type="checkbox"/>
Brief Message	Client called in and need's help with starting a new business.								Returned Call	<input type="checkbox"/>
									Completed	<input type="checkbox"/>
Monroe, Arnold	Caller	Frank (IRS)	Credit Hold	<input type="checkbox"/>	For	DE1, DE2	Fees	\$0.00	Paid	
Date	9/27/2011	Time	6:35 PM	Phone	(800) 555-1040	Ext		Email		Response Not Needed <input type="checkbox"/>
Brief Message	I spoke with John from the IRS this morning. He had to find out additional information about Arnold's return. He will be calling back tomorrow. When he calls please let me know, I will take the call immediately.								Returned Call	<input type="checkbox"/>
									Completed	<input type="checkbox"/>
All Weather Services, Inc.	Caller	John	Credit Hold	<input type="checkbox"/>	For	DE1, DE2	Fees	\$0.00	Paid	
Date	9/23/2011	Time	9:42 AM	Phone	(718) 555-9555	Ext		Email		Response Not Needed <input type="checkbox"/>
Brief Message	John called about the status about his 990 tax forms.								Returned Call	<input checked="" type="checkbox"/>
									Completed	<input type="checkbox"/>