CPAs
Business Advisors

cheryl jefferson & associates

CJA Client Service

All clients are assigned an Associate who is responsible for being the key point of contact for interactions and project work. This includes communications, deliverables, and review of supporting activities. Supporting activities include bookkeeping, payroll processing, 1099 processing, etc. You may receive communication for bookkeeping and payroll projects from support staff; however, the responsible Associate will also be informed or included on all emails so they remain abreast of all your projects.

The Client Interaction Program

Cheryl Jefferson & Associates (CJA) takes pride in providing a **HIGHER** level of service to semi-annual and quarterly compilation clients called the Client Interaction Program (CIP).

As a member of the CIP, we communicate with you on a continuous basis…

Upon acceptance

Once you are accepted as a client, we will call you for an introduction, an explanation of scheduling, and a tutorial on portal usage within 24 hours of retainer receipt and send an "initial request" for the initial engagement. You will receive a request for documents required for permanent files, contracts and tax files to be sent within one (1) week.

Daily

Emails and phone calls will be reciprocated within 24-72 hours depending on your client tier. Document checks will be performed within 48 hours of receiving notification that your data is available, in order to confirm receipt of all requested information.

By Project

You will be informed of the scheduled start and estimated completion dates of your projects via email. If 3 days prior to completion day, we determine that the project will not be completed on time (including Technical/Quality Control Review), we will notify you of the delays and inform you of the revised completion date.

Monthly

You will receive emailed information, news articles, etc. relevant to your business. Your Associate will also email or call you concerning the status of implementing recommendations (if outstanding).

Quarterly

Your Associate will call you to discuss status, problems, and concerns. We will also inquire about new contracts to update Contract Lists and Contract Briefs if you have an incurred cost submission requirements. We conduct Brown Bag Lunch training sessions for general client attendance every January, April, July, and October.

Semi-Annually

Your Associate will send your fixed asset list in order for you to review for disposals and inventory purposes (Nov & May).

Annually

Once a year, your Associate and the Principal will schedule a visit with the company's owner, if you are in the metro area. Otherwise, a conference call will be scheduled. If you are a new client and did not have an in-person training session, then we will schedule a meeting 2 weeks after the initial engagement has been completed. Typically in August, we will follow up to determine the type of year end financials that you require based on size, bank requirements or SBA requirements. We contact our business tax clients for estimated calculations of tax liability at the beginning of fourth quarter. We conduct an annual Open House in September so clients can meet and greet one another and the rest of our staff. During December, we will call to discuss year end requirements, explain the importance of year end email notifications and identify necessary paperwork to start compilations.

When we encounter changes in scope or reconciliation problems…

Occasionally, we will encounter problems or request that were not contemplated in the original quote for services. We will notify you immediately of work that is out of scope of the original engagement when we have spent ½ hours researching, troubleshooting or attempting to reconcile a problem. You will receive a change order form (in email) with the problem and estimated time to be spent in order to resolve the issue. We will need your approval for the additional work prior to continuing.

What happens when my Associate goes on vacation…

One way we keep qualified staff is to balance work and personal, so we provide lots of paid time off. However, our Associates are mindful of client needs so if they will be on vacation for longer than 3 days, they will notify you as to the status of open projects at least one week prior. They will also inquire about upcoming priorities that may occur during leave.

Delays do occur…

Our responsiveness depends heavily on scheduling and being provided with the information necessary to do what you hired us to do. If we haven't heard from you after a week, we will call to inquire about the status and your estimated date of response. After two weeks of delays, we will send you a reminder that the project has been removed from priority and further delays may require postponement. After a month of no response, our Principal will notify you that project has been postponed and all work up to that point will be billed as hourly.

When clients transfer from one Associate to another…

In order to remain responsive, sometimes client loads must be adjusted and you may be reassigned to another Associate. When that happens, there is transition meeting between the old and new Associate to discuss client contacts, trouble spots, previous recommendations not implemented, open items.

How do we measure our client service…

Our Executive Assistant sends out Client Satisfaction surveys twice a year to a selection of clients covering a cross-section of assigned Associates. It is important that you respond promptly to the survey in order for us to take corrective action. We will follow-up on missing surveys to ensure at least 75% feedback.