cheryl jefferson & associates

CPAs
Business Advisors

CJA Client Service

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 QuickBooks Sanity Checks, 1099 processing, reconciliations, etc. You may receive communication 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. We will also email or call you concerning the status of implementing recommendations for improvement (if outstanding).

Quarterly

We 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.

Semi-Annually

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

Annually

Once a year, the Principal will schedule a conference call with the company's owner. If you are a new client and did not have a training session, then we will schedule a meeting/call 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. 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 of financial statements.

When we encounter changes in scope or reconciliation problems…

Occasionally, we will encounter problems or requests that were not contemplated in the original quote for services. While we attempt to explain in our quote those services that would be considered out of scope, we cannot predict them all. In this case, we will offer you the opportunity to correct if we expect to spend 2 or more hours researching, troubleshooting or attempting to reconcile the problem.

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 all 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 temporarily or permanently. 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, and account nuances.

How do we measure our client service?…

Cheryl sends out Client Interaction polling questions once a month to all clients. It is important that you respond promptly to the polls in order for us to take corrective action. We will follow-up on missing responses to ensure at least 50% feedback.