Effective Client Rescheduling Tips

1. Create a Rescheduling **Policy**

Create a rescheduling policy to set expectations upfront. This way, clients know what to do if their plans changeand they understand your boundaries, too.



2. Plan Your Schedule

Review your appointment history to identify patterns in rescheduling requests. For example, if you notice many last-minute changes during tax season, consider adding extra flexibility to your schedule during those months. This proactive approach allows you to avoid potential conflicts and create a more reliable client experience.

3. Be Flexible

Block extra slots in your schedule for emergencies or last-minute changes if possible. You can also consider evening or weekend availability for clients with tight schedules. Being adaptable shows you're willing to accommodate their needs.





4. Communicate Changes

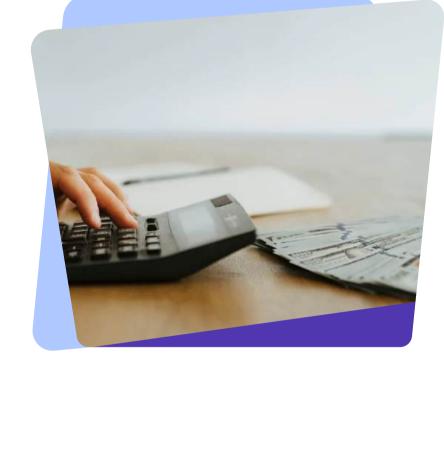
If you need to reschedule an appointment, reach out as soon as possible. You can send an email, text, or use accounting client management software to automate this process. The quicker you act, the more professional and dependable you appear.

Always provide specific dates and

5. Provide Alternatives

times for rescheduling to make the process easier for your clients. Tools like scheduling platforms for tax businesses or client portal software for accountants allow clients to choose new slots that work best for them.

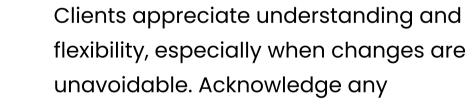




Simple Nobody likes complicated processes. Make it simple for clients to pick a new

Make Rescheduling

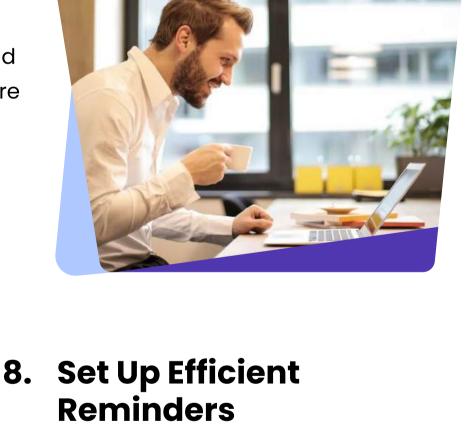
time. Tools like online booking systems let them reschedule directly without back-and-forth messages.



7. Show Understanding and

Empathy

inconvenience caused and reassure them of your commitment to their needs.



Every schedule change should include

clear communication. Use automatic

Follow Up After

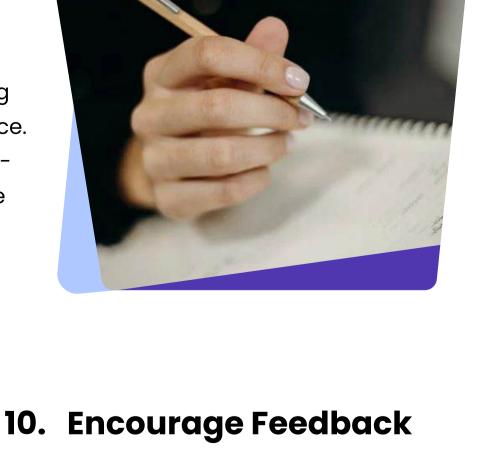
notifications to confirm the new

appointment immediately after rescheduling, followed by reminder messages a week and a day before the appointment. This keeps clients informed and reduces the risk of missed appointments, ensuring smooth scheduling.

A simple follow-up after rescheduling shows you care about their experience. It can be as easy as sending a thank-

Rescheduling

you message or checking in after the rescheduled meeting.



Invite clients to share their thoughts about the process. It's an opportunity to improve your process and show clients you value their input. You can ask casually during the next meeting or include a brief feedback link in your follow-up message.