

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 change—and 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.



5. Provide Alternatives

Always provide specific dates and 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.



6. Make Rescheduling Simple

Nobody likes complicated processes. Make it simple for clients to pick a new time. Tools like online booking systems let them reschedule directly without back-and-forth messages.



7. Show Understanding and Empathy

Clients appreciate understanding and flexibility, especially when changes are unavoidable. Acknowledge any inconvenience caused and reassure them of your commitment to their needs.



8. Set Up Efficient Reminders

Every schedule change should include clear communication. Use automatic 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.



9. Follow Up After Rescheduling

A simple follow-up after rescheduling shows you care about their experience. It can be as easy as sending a thank-you message or checking in after the rescheduled meeting.



10. Encourage Feedback

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.

