

The Need for Secure Client Portals

By Mark Holton

The huge advancements in technology over the last 25 years have seen massive changes in the way we work. One of the most significant changes has been communications with our clients. How long ago was it the phone and post?

Today email is our primary method of communication. The average accountant will receive over 1,000 emails a week. That is over 100,000 emails sent and received per year.

Ask yourself the following questions:

- Is Microsoft Outlook your filing cabinet?
- Do you know if your clients are reading important communications from you?
- How many times a year do you get asked to resend things you have already sent clients?
- How often is someone in your office waiting for something that a client has already sent?
- Are you in control of your communications with clients?

Many of our clients are adopting new technology, meaning there is an expectation for their accountant to keep up. Did you ever stop to think about the ordeal your client is going to have to undergo when they email us a 50mb MYOB file? A business in Melbourne had 22 failed attempts to email a very large MYOB file to their Accountant last year before giving up and burning a CD and couriering it. This is why so many firms are adopting Client Portals in their practices.

So what is a Client Portal and why are they so popular?

The Oxford dictionary defines a portal as “a doorway, gate or other entrance”. This literal definition gives us a great understanding of what a client portal is - a gateway of communication between your firm and your clients. Accessed directly through your website, your clients can simply and securely upload and download confidential information at their convenience 24/7 from anywhere in the world. The files are stored on a secure server which means you need no hardware and no technical knowledge; it is all taken care of.

How can a Client Portal benefit my accounting firm?

My Accounting firm Dynamic Taxation and Training Services recently implemented the Secure Returns Client Portal www.securereturns.com.au. I was very taken with how easy it was to operate for my clients and my staff and how quick and painless it was to setup. The extensive reporting allows me to monitor the flow of files in and out of my practice at the click of a button.

Having a portal will not only show your clients that you care about the security of their confidential information but also improve the efficiency of your staff, with the ease of file up and down loads.

The benefits for my firm has been priceless!