canopy

FIX YOUR EMAIL, FIX YOUR FIRM

7 AUTOMATION STRATEGIES FOR CLIENT COMMUNICATION

NEW MESSAGE

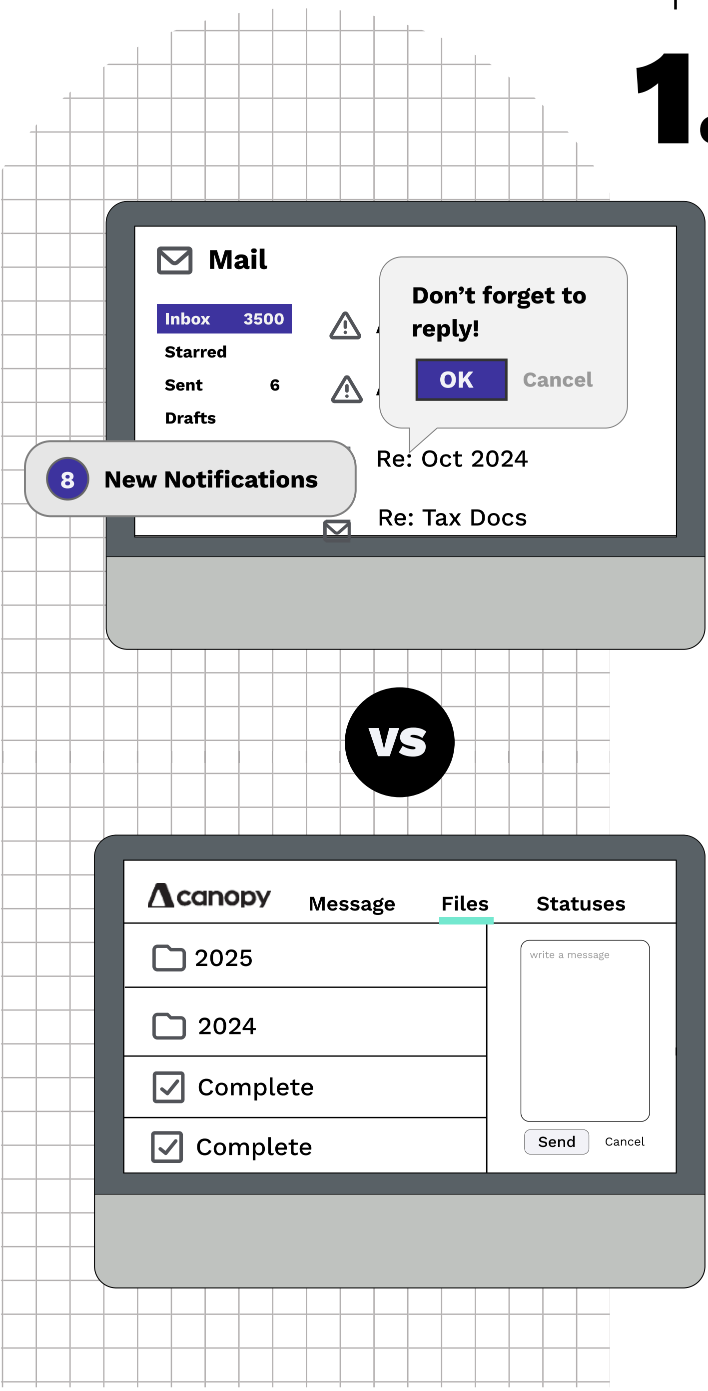
Let’s be honest, email isn’t going anywhere. The average accountant handles more than 100 emails every single day. That’s hours spent reading, replying, following up, and digging for attachments that always seem to disappear right when you need them.

Even with all the modern tools available, 79% of accountants say their firm couldn’t function without email. The problem is, most firms are relying on email for things it was never built to do, like managing client intake, tracking work, and organizing files.

Here’s the good news. You don’t have to live in your inbox. You just have to stop trying to use email for things it wasn’t designed for.

With the right systems, you can streamline communication and intake, automate client interactions, and free up your time to actually get things done.

SEND A



1. Write the Right Kind of Questionnaires

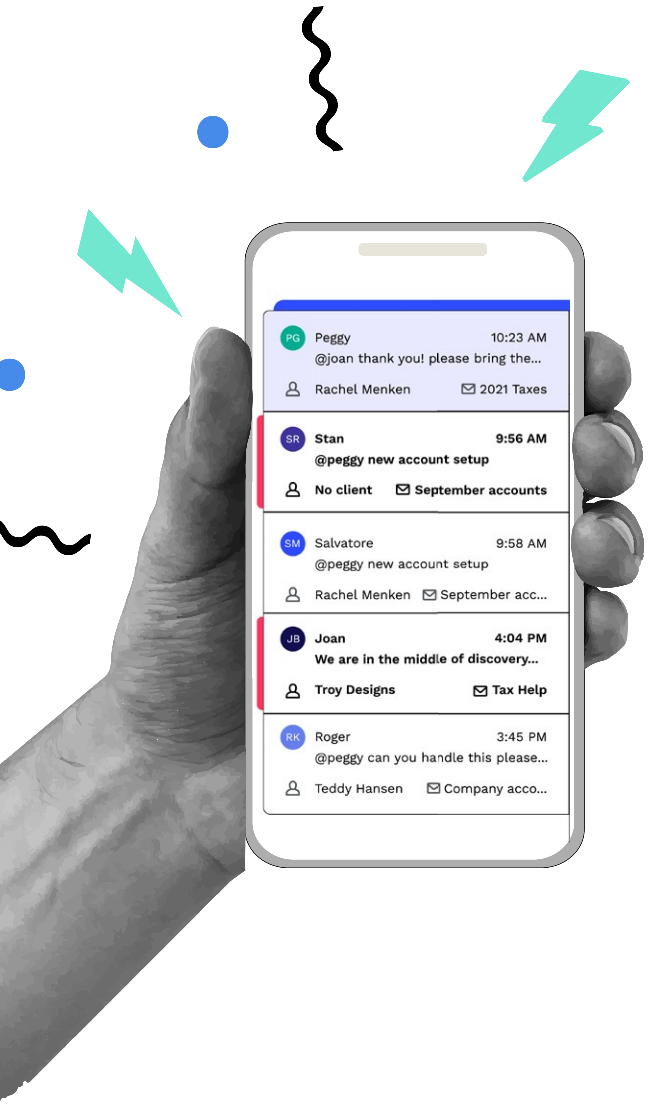
If email is your intake process, your inbox is basically your CRM, project manager, and document storage system... which is exactly why it’s such a mess.

Because email doesn’t just really collect information, it splits it.

- One client answers three questions... but forgets the attachments
- Another sends five emails with “one more thing” (and none of it matches your checklist)
- Someone replies-all to an old thread with last year’s organizer
- Your team spends more time searching and sorting than actually doing the work

So when we talk about better questionnaires, this is the real goal:

Fewer back-and-forth emails. Fewer “what did they mean?” clarifications. Fewer missing docs surprises.



A good questionnaire isn't going to eliminate client questions, but it can eliminate avoidable, "can't believe we're going over this AGAIN" questions.

Pro tip: Ask for documents using 'client language' not tax language

When you request documents, realize that clients don't think in "1099-INT vs 1099-DIV." They think "bank interest statement."

Do this instead: Use plain-English labels: "Bank interest (1099-INT)" Add examples right in the question: "Look for a form that says..." Group requests by life category: Income, Home, Kids, Investments.

Result: fewer "I didn't know what you meant" follow-ups.

Canopy Hack: Use Smart Intake Questionnaires to Collect Client Information

If your client intake process becomes detective work, you're doing it wrong. With Canopy's AI-powered Smart Intake, you no longer have to stitch together client information from half-filled PDFs, forwarded emails, and "Oh I forgot to tell you..." late night messages.

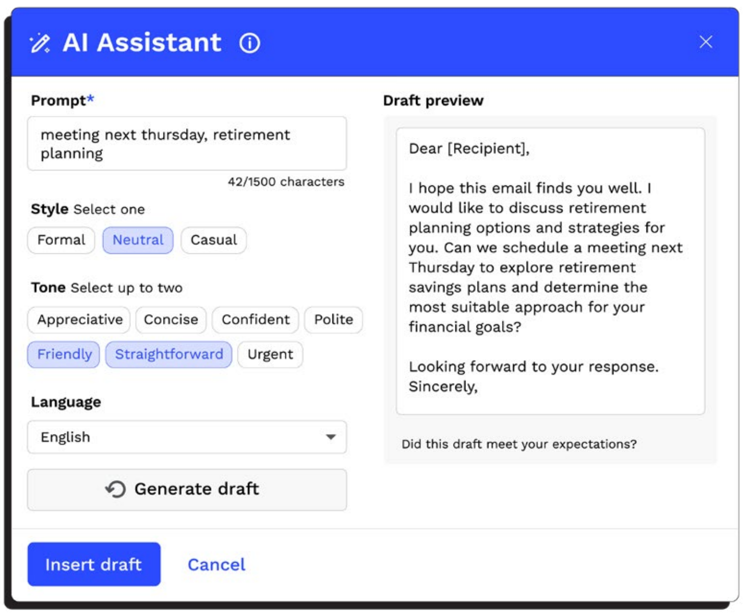
With these AI-powered questionnaires, intake becomes a guided, adaptive experience that's simpler for your clients and dramatically easier for your team.

Here's how Canopy questionnaires simplify client intake:

- **AI-built and pre-filled**
  Questionnaires are generated from firm templates and existing client data, so clients review and confirm instead of starting from scratch.
- **Adaptive questions that adjust as clients answer**
  Smart logic ensures clients only see what's relevant, keeping intake shorter and less frustrating.
- **Automatically triggered and followed up**
  Questionnaires launch as part of workflows and reminders are sent automatically until they're completed.
- **Clean, connected data across Canopy**
  Responses stay tied to the client record, tasks, documents, and engagements, so your team always works from accurate information.

TLDR: Good, client focused questionnaires simplify and improve the client experience for your clients, your staff and yourself. Canopy Smart Intake revolutionizes intake by reducing friction, speeding up turnaround time, and eliminating the email chasing that slows firms down.

2. Don’t Write Emails from Scratch



Do you ever know what you want to say, but figuring out how to say it professionally, clearly, and tactfully becomes a huge time drain? Whether you’re stuck crafting a tricky message or just trying to format a simple response, writing from scratch only slows you down.

That’s where AI comes in. With today’s technology, there’s no reason to agonize over tone or structure. AI can take your bullet points, incomplete thoughts, or even your frustration with a difficult client, and turn it into a clear, well-formatted, and professional email. It can also help you rephrase sensitive conversations to protect client relationships while maintaining your authority.

This isn’t about replacing your voice; it’s about speeding up your process and making communication easier. AI is your writing assistant, ready to clean up your message and help you get the response you’re looking for.

Pro Tip: Build a Personal Email Template Library for Reusable Replies

Even without automation or AI, you can create a consistent, time-saving email system by saving frequently used messages—like tax document requests, payment reminders, or status updates—as templates in a shared document.

This helps you respond quickly to common requests and, when shared across your team, ensures consistency in communication. It's also a great resource when training junior staff on how to respond professionally to clients.

Canopy Hack: Let AI Draft Emails for You—Right Inside Your Inbox

Canopy integrates directly with ChatGPT, so you can draft a new email or a reply **without ever leaving the platform**. From the email editor:

1. Select the AI icon
2. Drop in a quick prompt, description, or bulleted list
3. Select the style and tone
4. Let AI generate a professional draft based on your input
5. Review, revise, and send—or fine-tune the tone to sound more friendly or more formal
6. Change the language as needed

It's built to save you time and help you communicate more effectively, whether you're managing 10 clients or 100.

Canopy Hack: Let AI Draft Emails for You Right Inside Your Inbox

Writing client emails is one of the most repetitive and time-consuming parts of the job (that's a nice way of saying time-waster).

Canopy's built-in AI helps you move faster by drafting clear, professional emails directly inside your inbox, so you are not switching tools or starting from scratch. From the email editor, you can draft a new message or generate a reply with a simple prompt, even if it is just rough notes or a few bullet points. If you want the message to sound more friendly, neutral, or formal, you can choose the tone upfront and instantly generate a polished draft based on your input. If the first version is not quite right, you can quickly rewrite or refine it to adjust clarity, length, or tone, and you can translate emails into another language when needed.

Because the AI works inside Canopy, it fits naturally into your existing workflow, so you do not have to switch context or learn a new tool just to get an email out ASAP.

3.

Contact Clients in Bulk

Need the same information from multiple clients? Don't send 50 individual emails.

Bulk messaging is a game-changer for accountants—it saves hours, reduces errors, and ensures every client gets the same clear, accurate information. Whether you're reminding clients to upload tax documents or announcing a deadline change, bulk actions keep communication fast and efficient.

The Do's	Don'ts
Segment your list by service, location, or status	Blast your entire client list with one generic message
Personalize with dynamic fields (name, due date, service)	Start with "Dear Client" or forget personalization
Keep emails short, clear, and focused	Overexplain or get technical in bulk emails
Use templates and automations for routine progress/ status updates	Use bulk messages for sensitive issues
Test and preview messages before sending	Assume it looks good without checking formatting or personalization
Link messages to tasks or requests where possible, so work actually moves	Send emails without a clear next step
Designate a specific "reply-to" email address for email templates	Remind clients who already completed the task

Canopy Hack: Use Bulk Email to Drive Client Action

Canopy's bulk email tools do more than send mass messages; they drive on-time client replies.

From filtered client lists you can quickly:

- Send targeted bulk emails to specific client groups
- Notify only affected clients about deadline changes
- Follow up with clients about missing documents—without emailing those who already complied

Because bulk emails are tied to client records and workflow status, replies and next steps stay organized instead of disappearing into inbox chaos.

With dynamic fields and smart segmentation, your bulk messages still feel personal and professional.

Extra Credit: Build an email template that you can use for recurring situations.

SEE CANOPY'S BULK MESSAGING IN ACTION

4. Simplify Payment Collection & Recurring Billing

One of the most time-consuming and frustrating email threads you send? The dreaded "Just following up on this invoice..." message. In fact, 56% of all invoices in the U.S. are paid late, and for most firms, that means a flood of payment reminder emails. It's not just annoying. It's costing you money.

You're running an accounting firm, not a bank. Stop chasing down late payments and build billing into your process from the start. By collecting payment details upfront or enabling auto-pay, you reduce cash-flow issues and eliminate a major email burden for your team.

Pro-Tip: Send Reminders *Before* the Invoice is Due

Don't wait until a payment is late to follow up. Instead, schedule a friendly reminder 3–5 days *before* the due date. You can even create a template so you're not rewriting the same email every time.

Being proactive makes the message feel like a helpful heads-up rather than a nag. It keeps the tone positive and the cash flow moving.

Canopy Hack: Make Payments Frictionless for Clients and Your Team

Canopy makes it easy to get paid without chasing clients.

With built-in invoicing, online payments, and recurring billing, clients can pay securely through their client portal using ACH or credit card—no extra logins, no back-and-forth emails. You can also store payment methods on file for recurring services, so invoices get paid automatically and on time.

Using Engagements, firms can collect upfront payments or deposits before work begins, helping set clear expectations, improve cash flow, and protect against scope creep.

Payment automation results in more than just faster collections. When you've got it dialed in, you can fully eliminate awkward follow-ups and reduce admin work. Let your team focus on client work instead of accounts receivable.

5. Set up reminders

Humans forget. You forget. Your clients forget.

Let the computer do the remembering. When dealing with requests (especially payments!), make your tech do the work.

Things You Should Set Up Reminders for:

- Payments and billing, recurring and nonrecurring
- eSignatures, tax documents, and engagements
- Document collection

Pro Tip: Use Calendar Integrations and Task Automation to Trigger Client Nudges

Even if you're not using a dedicated practice management tool, you can still automate client reminders. Use tools like Google Calendar, Outlook, or Trello to create recurring reminders, then layer in Zapier to handle the follow-up.

Example: If a task isn't marked complete by a certain date, Zapier can automatically send a reminder email to the client.

This keeps both your team and your clients on track. And no one has to manually follow up.

Extra Credit: Create a shared doc outlining your firm's reminder rules. It helps the whole team stay aligned and avoids rogue follow-up emails from well-meaning team members who didn't realize an automation was already in place.

Canopy Hack: Automate Your Workflow

When you send a client request in Canopy (for documents, questionnaires, payments, or eSignatures), you can turn on automated reminders so follow-ups go out on your schedule until the client completes the request. Less chasing. Faster turnarounds.

And with Canopy Workflow Automations, you can set up rules that automatically trigger tasks, update statuses, and send notifications when key events happen, like a task being completed or an engagement being accepted. For example, when a project status changes, Canopy can automatically notify the client or kick off the next step internally so progress keeps moving without manual check-ins.

6. Turn Emails into Action

Most of the emails you get mean something needs to be done. Whether it's reviewing a document, answering a question, nearly every message triggers work for your team.

But when email isn't connected to your workflow, it's way too easy for those tasks to fall through the cracks.

Instead of letting your inbox become a to-do list you have to manually manage, build a process that turns emails into structured, trackable action. You can create tasks, link to an existing task, save a document, and more directly from an email.

Pro Tip: Set Up a Shared Action Item Inbox

If your current setup doesn't support automating emails into tasks, set up a shared email address—like **action@yourfirm.com**—where team members forward any client emails that need follow-up.

Assign one team member to check that inbox regularly and turn those emails into tasks. It still takes a human touch, but it helps centralize requests, reduce dropped balls, and keep the whole team aligned on what matters most.

Canopy Hack: Go from Inbox to Workflow in Seconds

Canopy's **Global Inbox** helps you turn client emails into action without bouncing between tabs. You can:

- **Create a task directly from an email** in the Global Inbox. The task can be pre-filled with details from the message, and the email stays attached to the task for easy reference.
- **Save email attachments straight into Canopy Files** from the client's Communication tab, so you can file documents to the right folder without downloading them to your computer first.
- **Add a new client from an email** by clicking "Add to Clients" in the Global Inbox, with Canopy pulling details to pre-fill the client record.

Net result: fewer clicks, less context switching, and a clearer paper trail from "they emailed us" to "it's in workflow."

7. Audit Your Client Experience

Your client experience is not just a “nice to have.” It’s the system your clients learn to follow. Every portal you send them to, every upload request, every signature step, and every reminder teaches clients how to work with your firm.

That’s why it is worth stepping back and asking: What does it feel like to be your client right now? When the process is clear and consistent, you can train clients to interact with your team in a predictable way.

Fewer one-off emails, fewer “where do I send this?” messages, and fewer last-minute scrambles. Good systems set expectations, reduce friction, and make it easier for clients to do the right thing the first time.

Pro Tip: Audit the Client Experience

Want to improve your client relationships? Go through your own client experience.

Log in to any portals you currently direct your clients to and accomplish all of the tasks you ask of them. Pay attention to things like: how long does it take you? Where does it get sticky? Does it function the same way on mobile and on desktop?

Canopy offers a client portal that creates a seamless experience for clients. But even without a dedicated practice management software, consider and evaluate the experience you’re providing for your clients.

Identify any bottlenecks in the process and assess if there’s anything you can do to alleviate them. Less stress for clients when it comes to uploading documents, signing forms, and having access to their information means less stress for your team.

Canopy Hack: Reduce Inbox Clutter with a Client Portal

Using Canopy's Client Portal lets you move day-to-day client back-and-forth out of email and into one secure, centralized place. Instead of digging through threads and sending repeated follow-ups, clients can upload documents, complete requests, sign forms, and view what they need in the same consistent experience.

The result is less inbox noise for your team and a more professional, polished experience for clients, because everything is organized, trackable, and easy to find when it matters.

Focus on Work, Not Follow-Ups

You didn't become an accountant to spend your days chasing emails, writing reminders, or digging through threads for the one missing document.

You did it to help people solve complex problems, run better businesses, and stay secure. But when your inbox becomes the central nervous system of your firm, everything slows down.

By implementing smarter systems, like automating payments, using a client portal, and turning emails into tasks, you shift the burden away from manual follow-ups and into structured, scalable workflows.

The result? Less inbox chaos, more time back, and a firm that runs more smoothly for you and your clients.

LEARN HOW YOU CAN UNCLUNK YOUR EMAIL WITH CANOPY

SCHEDULE A DEMO TODAY