Momentum
for Professionals

Making Tax Digital Communication Checklist

Making marketing happen with Momentum

Making Tax Digital – Communication Checklist

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Use the checklist below to make your MTD process as effective as possible:

Internal Strategy

Create an internal work group to create and implement the firm's MTD plan. Things to consider include:

Capacity:

- ☐ Decide which online accounting packages the firm will be supporting.
- ☐ Agree and action your strategy for coping with likely future bookkeeping demand:
  - Will you be offering to do additional bookkeeping work for your clients?
  - Will you need to recruit / train more bookkeeping staff?
  - Do you need to consider outsourcing bookkeeping work to local (or international) bookkeepers?

Staff:

- ☐ Make sure staff are up to speed with MTD and how the firm will be supporting clients – have staff meetings, one to ones, attend training courses and webinars. This should cover technical and admin staff.
- ☐ Create a staff MTD fact sheet they can refer to when speaking to clients.

Training:

- ☐ Identify staff training needs for the new accounting software.
- ☐ Identify suitable individuals who will be able to train clients on the new accounting software.

Client Communications

Direct Communications:

- ☐ Update engagement letters and internal checklists to cover MTD information.
- ☐ Segment clients into groups, based on the likely timeframe for them to adopt MTD principles.
- ☐ Prioritise your communications to businesses with turnover above the VAT threshold who will be the first to move to MTD.
  - Of these target businesses, identify those who are currently using manual methods for record keeping and set in place a process for updating them on the changes, demonstrating online accounts software packages and getting them to move across to a digital reporting system.
- ☐ Create a communications calendar setting out the timeframes to contact different client groups with relevant information. Also include what channels of communication will be used, letters, emails, meetings, social media, MTD seminars etc.
- ☐ Send letter and/or email to clients whose implementation date is April 2018/19 outlining the changes, what impact it will have on them and how you will be supporting them.
- ☐ Discuss MTD during client meetings and phone calls, whether as part of a planned MTD meeting programme or during normal client activities such as year-end etc. Add to client agenda as a prompt.
- ☐ Create an MTD flier for each of the groups affected by MTD and send with letters.

Website & Apps:

- Ask your website/App provider what MTD resources they will be adding to your website/App (or in email newsletters). Find out if there will be automatic push notifications sent from your App.
- Also consider creating tailored MTD pages on your website, explaining how you can help clients and other businesses affected by MTD.
- Make sure MTD information (or a link to it) is prominent from your home page.
- Create a MTD fact sheet/guide which people can read and/or download from your website. This could also be printed and mailed, or saved as a pdf and emailed to clients.

Profile Raising:

- Consider organising MTD seminars or workshops to inform clients of the changes, demonstrate some of the software packages they can use, hand out MTD information sheets and provide a Q & A forum.
- Have regular mentions of MTD in newsletters/newswires which you send to clients (and prospects).
- Use social media to highlight MTD including updates from HMRC, MTD related news articles and how your firm can help.

Prospective Clients

- Place adverts in local press or parish magazines promoting the services and support you provide for MTD.
- Consider creating a Google AdWords campaign to attract new business.
- Contact your local radio and TV stations to see if they would like you to talk about MTD and how it will affect relevant individuals.
- Organise 'MTD clinics' whereby people can book to come and see you and they get a free hour of MTD advice. The clinics can be promoted via targeted mailshots, emails, local adverts and social media.
- Send MTD specific mailings to target businesses you'd like to have as clients, offer a free MTD review. Do a follow up call to this mailing a week after it is sent to confirm receipt and to set up appointments.

Introducers / Strategic Alliances / Business Contacts

- Use emails or newsletters to keep them informed about MTD and what your firm is doing to help businesses become MTD compliant.
- Offer to do MTD presentations at their local/regional networking events and business group meetings to explain what MTD is about and what individuals and businesses need to do.

Free MTD Marketing Review

If you'd like to discuss your firm's approach to communicating MTD to your staff, clients or prospective clients, I offer a free MTD Marketing Review call to help set in place your own plans. This review lasts about an hour and can be conducted by phone or skype. Contact me on the numbers below if this is of interest.

If you need help with your MTD communications plan
don't hesitate to call me on
01822 833300 or email vicki@momentumforprofessionals.co.uk