



Accounting Practice Customer Service Training Module Sample

Issues

Common Situations.

A gentleman is on the phone complaining that it is silly to bill him for his four minute phone call asking a quick question. What do you say to this man's complaint?

Sample Game Cards

(Shown smaller than the Actual 3 1/8" by 2 1/4" size)

Billing Issues.

A person is on the phone and is complaining that her boss is refusing to pay for an account reconciliation. You see that her accountant clearly noted this was done at her insistence. What do you say?

Advice vs. Service.

A client has been told that his use of business lunches may be excessive. While at the lunch a day later, you see this client having lunch with one of his assistant managers. What, if anything, do you do after seeing this?

Client Motives.

Other than the cost, name one reason for the popularity of tax preparation software.

Recurring Problems.

A man claims he has been assessed penalties for his incorrect tax filing and he feels it is our error that caused this issue. The problem is that you remember this late filing man from a year before making the same claim. What, if anything do you do?

Teamwork.

In your business, whose job is it to make sure your clients are treated with respect when visiting your office?

The Thoughtless Client.

A client is on the phone, asking you to set him an appointment during a busy time. At least three times prior, he has made appointments and then not shown. Do you make the appointment?

Ethics and Service.

A woman is asking if you would write up a phony receipt for today's consultation. She explains that her husband would be furious and violent if he learned about her consultation prior to being served with the papers for divorce. What is your response?