

## Managing your client comms the Senta way

You already know good communication is key to running a successful firm. Get it right and your clients will be engaged and adoring. Get it wrong and you're looking at an ineffective business and a faltering client relationship. Senta can help you automate and manage your communications so your clients know exactly what is expected of them and you keep on top of your workflow.

In this short guide, we share ideas from accountants and bookkeepers to make communication work for you and your practice. And we look at the ways that Senta makes it all that much easier.



**What do we mean by communication?**  
For the purposes of this guide, we're talking about business comms - specifically emails and text messages that you share with your clients.

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### Best-practice communications

#### Keep it brief and succinct

Short and sweet is key. Make it clear what the communication is in the subject line, so it's easily searchable in their email inbox.

#### Tone of voice

Make sure it sounds like it's coming from your firm. Tone is really subjective but you can demonstrate characteristics of your firm through use of adjectives, contractions (don't/ can't) and sign off. Toodle pip!

#### Store to client file

It sounds obvious but all emails and subsequent responses should be saved to file so your colleagues can keep track of what's been sent.

*Senta does this all automatically!*

#### Think multi-channel

You can reinforce your email comms via different channels. Text messages often remind people to act. Promote your newsletters via your social media and repurpose the content for social posts.

#### Check for mistakes

It's easily done - but typos, date errors or the wrong links can undermine your authority. Never be afraid of getting another pair of eyes on what you ~~write~~ *Write*

#### Less is more

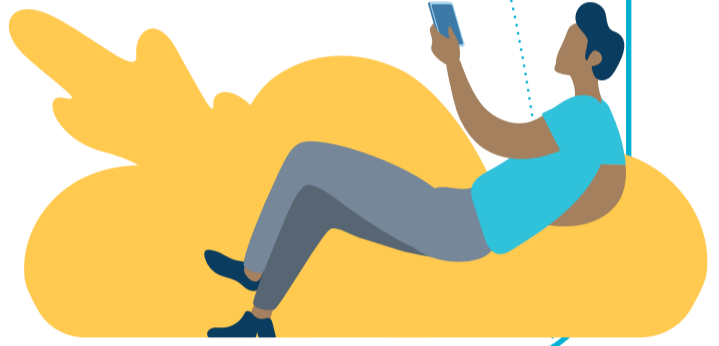
You don't need to elongate what you want to say. Just make it clear what the requirement is.

#### Be clear about next actions

What is it you want them to do? Arrange a call? Visit the client portal? Sign something off? Or just read the email. Be clear about what you expect of them.

#### Targeted, relevant, timely

If you're sending newsletters, make sure what you're saying is relevant or it will put people off reading subsequent comms. We always put things through the "so what?" test. Also, make sure you're sending the most up to date info - this has been a real challenge throughout the pandemic. And be mindful of events that may mean people find good news/promotions as inappropriate.



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### Senta CRM FAQ

#### Can I use Senta for sending marketing campaigns?

Yes, Senta is perfect for marketing campaigns! For a start, all your contact information is already present and categorised so you can precisely target your audience. Using the client list you can filter your clients to suit the campaign. For example, to email prospects, you'd filter by client state. To email a sector e.g. all charities, you'd filter by client type or business area.

When drafting your communications, you can use placeholders to tailor your message to the specific client by including their names, company information and more - **please see our guide [here](#) for further details.**

#### Can I include images?

You absolutely can. Simply copy and paste an image into any email and it will appear as intended. You also have the option to add images as an attachment if you prefer - this can all be done when editing the email, or the send email task.

#### Can they be sent from different names?

Yes! When sending out an email to your clients, you have the option to select which email address the message is sent from.

You may want your email to come from a more generic address (info@ or hello@ for example) in which case you have the option to have this address set to one of your existing users. Or contact the Senta support team and we can set up an email-only user profile for you for free.

#### Can I schedule emails to be sent in the future?

One of the most powerful aspects of Senta is the ability to automate your work. The ability to schedule messages to be sent in the future is no exception.

You can choose to add an email task as part of any workflow and this task type can be assigned to Senta - meaning it is sent out automatically. Using a job you can send a series of emails which go out at custom intervals, or if you want regular communications then you might choose to set up a service which repeats on a monthly, quarterly or annual basis.

#### Do you offer template design emails?

At present there is no dedicated feature to allow for email templates within Senta. You can send out a standard format at regular intervals (say a monthly newsletter) it is possible to achieve a similar result by creating a 'send newsletter' job.

**If you are interested to know more then please [get in touch with our support team](#) who can help get you started with the config.**



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### How it works

Using Senta for client communication

#### Setting up group emails

Whether you want to target all prospects, or all clients who work in a specific sector you can easily segment your client data using the client list. Find out more about sending emails [here](#)

#### Setting up services

Services are a simple way of grouping together your jobs, or of making your jobs recur on a regular basis. Using Senta you can set up a service where a monthly newsletter or quarterly communication goes out to your clients automatically. To get started with making your own services, [take a look at our guide.](#)

#### Text messages

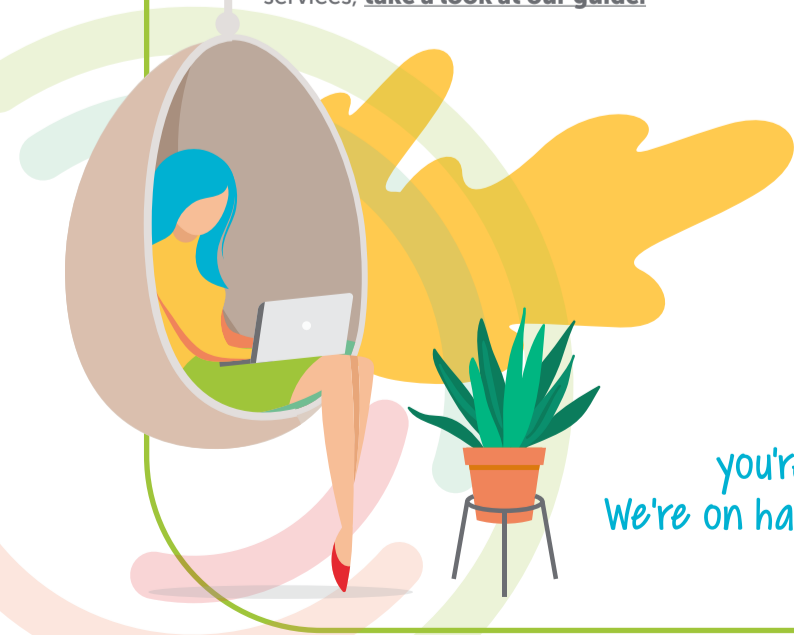
Text messages are a great way to send out quick updates or reminders to clients. Using Senta you can send **one-off texts** to individual clients or groups of clients. You can even use **placeholders** to personalise your messages, or build texts into your **standard workflows**. All texts sent from Senta are free of charge.

#### Setting up onboarding

Senta comes with a template client onboarding job, to guide you through getting new clients set up. You can edit this job or create your own one from scratch which means you can add in templated emails which explain more in onboarding process. [Find out more in our guide to creating jobs.](#)

#### Adding emails to jobs

You can build emails into one-off or repeating jobs, so your clients are reminded about the right thing at the right time.



And that's it - you're ready to get started!  
We're on hand to support you all the way!

If you have any questions contact our support team at [support@senta.co](mailto:support@senta.co)

#### A bit about Senta...

Senta provides sublime practice management software for accountants and bookkeepers all around the world. It's a cloud-based CRM and workflow tool which combines email & text automation, secure document exchange and a client portal to support you in running your practice and delivering excellent client service.

#### 30 day free trial

30 days is all it takes to love us. You can sign up for a free trial today. No credit cards or commitment required. And we'll give you all the help you need to get up and running, quickly.