

Client Announcement Template

Sample Company Announcement

Subject Line: You asked, We Listened: The Best Client Experience Yet

As John Chambers wrote in his book ***Connecting the Dots***, “Change usually needs to be dramatic. Sometimes that means changing businesses that aren’t broken. If you’re not tapping new technologies or tackling new opportunities, you’re not going to thrive, much less survive, in the digital world.”

Months ago, I was presented with an opportunity that put the future squarely in front of me. With a lot of thought and reflection, I’m excited to announce that we’ll be launching a new platform to serve our clients on; Botkeeper!

The Botkeeper Platform is going to make an amazing addition to our value set and is much better positioned to take on this new digital world and workplace. Based out of Boston, Botkeeper has developed cutting edge technology that will make the bookkeeping process simpler, more efficient, and cost-effective for our clients. You will have quick access to data in forms you previously haven’t had with **FIRM NAME**, so I’m excited for you to see what they can offer!

You will now be able to easily upload and share your financial documents with us, connect your bank accounts, communicate with our entire accounting team, get access to an interactive dashboard to monitor the financial health of your business, and more. This means we’ll be getting your bookkeeping done even faster so you can get near time financials and reports to better run your business. Also, no more having to send over bank statements or worry about your login credentials floating around- our financial hub is armed with bank-grade security!

I’m happy to say that nearly all of the Botkeeper setup is happening behind the scenes, so you shouldn’t see much disruption in your services or point of contact. We have worked hard to build those trusted relationships with you and I am going to be active in the transition, so please don’t hesitate to reach out to me at any point with your feedback or questions.

What can you expect?

- Over the next few weeks, you'll see an invite prompt in your email inbox to create your user profile and password. In the new Client Portal, please follow the instructions and get connected within 2 business days.
- Inside the Client Portal, you'll be able to connect your bank and credit card accounts- this is quick and easy! We suggest blocking off around 10 minutes to make sure you can get everything done in one swift motion.
- Other details including screenshots of the Client Portal and instructions on other features are available as needed.

What's next for FIRM NAME? Our mission is still to serve the business community and help business owners become more successful. We are going to pivot our focus to more advisory and consulting work including CFO Services, business consulting, and financial services, allowing us to spend more time with you than ever before. And of course, we will continue to take care of your tax returns!

I'll end by sharing another quote from John Chambers, "**The measure of a great company is its ability to create shared wins for everyone.**" That's how I view this. I am truly grateful for all of you and the trust you've placed in me and my company. Life is a journey full of paths we chose to take. I'm excited to find out what's ahead for all of us.

A big thank you in advance for your patience and prompt involvement during this transition while we get things up and running! If you have any questions, feel free to reach out any time.

Your Trusted Partner,
Michael Scott, Dunder Mifflin LLC