

# Why Your Tax Professional Isn't Returning Your Calls

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If your tax professional isn't returning your calls, remember that tax offices are busier than ever

At this point it should not be news to taxpayers that the last two filing seasons have been hard on tax professionals and that this season is not showing any signs of improvement. Still, it's tax season and taxpayers need to be able to communicate with their tax professionals to ensure that their returns are filed timely, accurately, and most importantly this year, electronically. Indeed, according to [a recent survey of tax professionals](#) by Thomson Reuters communication skills are one of the most highly sought after talents in the tax industry. If communication and communication skills are so important, why aren't tax professionals returning their clients' calls? Maybe they are, just not in the way clients expect.

Most clients grossly underestimate the sheer volume of client calls and e-mails tax professionals receive during filing season. Clients prove it every time they start a call or e-mail with "I know you're busy but..." Even tax professionals who have administrative support to help with the volume are often overwhelmed by it. Amanda McGowan, an Enrolled Agent in the Denver, Colorado area, teaches a class on achieving the "no call office." But after speaking with many tax professionals on social media it has become clear that "no call" doesn't really mean no calls at all. Even the most vehement

proponents of the no call office realize that speaking on the phone has its advantages:

- It provides flexibility for clients with different communication styles and different resources.
- Voice inflections often add important nuance to the conversation.
- It allows for open ended questions and, consequently, a more thorough discussion.
- Sometimes it's simply faster to pick up the phone to do a deeper dive into the reasoning behind a question than to draft an e-mail that contains enough questions to provide a thoroughly anticipatory follow up discussion.

Nevertheless, in the recent chaotic filing atmosphere many tax professionals have realized that the only way to handle call volume is to set firm boundaries around how and when calls will be taken and returned. To ensure that they get enough time to focus on tax returns some tax professionals practice time blocking. They set aside time, usually the times they find most productive, for deep work and block less productive time for returning calls and answering e-mails. How does that look in practice? Well, if your tax professional is a morning person it usually means your calls and e-mails will go unanswered until the afternoon. If your tax professional is a night owl it means you could receive an e-mail response to your voice message in the middle of the night (they aren't expecting an immediate reply) or that they will return your call in the morning because they reserve their afternoons and evenings for deep work.

Often time blocking is used in addition to call scheduling. To make the best use of their time tax professionals are not refusing to take or return calls, they are simply refusing to take unscheduled calls. Unscheduled calls disrupt workflow and often cannot be resolved without additional research, which then necessitates yet another call. Tax professionals who require calls to be scheduled also typically require the reason for the call to be provided before booking the call. Providing the reason for the call when you book the call allows your tax professional to look up your tax information, review your question, and do any research necessary to answer the question before they ever get on the phone.

Pre-booking often makes for a much more satisfactory experience on both sides of the call. Sometimes, however, tax professionals prefer to follow up to voice messages by e-mail. Why? Because they need to document the conversation for your file. Responding to voice messages by phone typically requires the tax professional to respond twice: once by returning the phone call and again by typing notes documenting the call into your tax file. If the question requires research or is reasonably complex, often the most practical solution for the busy tax professional is to “eliminate the middle man” and respond with an e-mail instead of by phone even when that is not the client’s preferred means of communicating.

Remember, tax professionals are business people and they have to work in ways that are good business. In other words, it may only *feel* like your tax professional isn’t being responsive when they are, just perhaps not in the way you expect. So what can taxpayers do to help ensure their tax professional returns their calls?

- Don't call with questions that can be answered by looking at the firm's website (*e.g.*, Are you open on Saturday?). If your practitioner's firm has a website try looking there for answers before you call. Many firms have prepared handouts that answer common questions available on their websites (*e.g.*, valuing charitable contributions, tracking business mileage, deductibility of business meals, etc.).
- Don't expect exceptions to be made for you. If your tax professional sends office updates, newsletters, or other mass e-mail messages, read them. Often these one-to-many communications contain answers to your questions because many other clients are asking the same questions and it's more efficient to respond to everyone at once than to provide individual responses.
- Respect the office policy concerning when calls will be returned and by whom. Schedule your call if that is what the office requires. Don't insist on talking to a firm principal or partner when someone else has been provided with the information you were seeking and has been tasked with returning your call.
- Provide a reason for the call when you are calling. Often it is more practical for the tax professional to return your call using e-mail rather than the phone. If you just leave your name and number but no reason for the call, depending on the office your call may not be returned at all.

- Don't phone to ask if your tax professional got your e-mail or your earlier voicemail unless it has been longer than five to seven business days after you reached out to them.
- Don't call or leave a voicemail just to see if your tax professional has everything they need to prepare your return. Pro tip: If a tax professional is missing information, they will contact *you*.
- And never, ever call your tax professional just to "check the status" of your return or you may find yourself looking for a new tax professional.