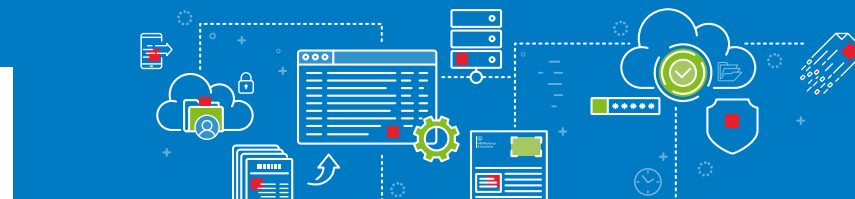




Making Tax Digital *Developing a new communication plan*




Start with clients who will be impacted by the first phase of MTD. Segment your clients who are VAT registered or will be by April 2019.


 Secondly, analyse which of those clients are currently using software for bookkeeping (A clients).

 Thirdly, analyse which of your clients are not maintaining digital records and if they can either be transitioned onto a bookkeeping tool or use a standardised spreadsheet (B clients).


Now, follow the communications plan on the next page.

OCTOBER


 Explain what MTD is and what changes they can expect.


 Explain what MTD is and what changes they can expect. Offer training and guidance to transition them onto an bookkeeping service or offer to facilitate this service on their behalf.

NOVEMBER


 Urge these clients to act. For those clients who are unable to transition over to a bookkeeping service offer them a standardised spreadsheet which can collect all the necessary data.


JANUARY

 Remind your clients that MTD is three months away and make them aware of your data expectations and any penalties they may incur for missed deadlines.





FEBRUARY

 Inform your clients about additional bookkeeping and advisory services your practice can offer them.



MARCH

 Remind your clients that MTD is one month away. Explain your expectations of them in terms of data collection and dates for sign off.



APRIL

 Email your clients to celebrate a successful start to MTD. Use this opportunity to explain what other services you can offer to help them grow their business.

