FREE RESOURCE FOR ACCOUNTING FIRMS

The Document Collection Blueprint

How to stop chasing clients and build a system that works month in, month out — regardless of what tools you use.

SECTION 01

The Real Cost of What You're Doing Now

Two minutes. One number. Most people find it higher than they expected.

Most accounting firms know document chasing takes time. Very few have put an actual number on how much. The calculation is straightforward — and the result is usually the moment this stops feeling like a minor inconvenience.

EXAMPLE FIRM — 25 MONTHLY CLIENTS	At $150/hr billing rate
Average follow-up emails per client per month	3 emails
Average time per follow-up (compose + send + log)	8 minutes
Total follow-up time per month	10 hours
Monthly cost in unbilled time	$1,500
Annual cost in unbilled time — follow-ups alone	**$18,000**

This only counts reminder composition. It does not include the time spent scanning inboxes for replies, handling wrong-format resubmissions, or the status management overhead of tracking 25 open requests simultaneously. The real number is higher.

YOUR FIRM — FILL THIS IN

Number of active clients	________
Average follow-ups per client per month	________
Minutes per follow-up	________
Your hourly billing rate	________
Your annual cost (clients × cycles × mins / 60 × rate × 12)	________

186	23%	3.2×
HRS / YEAR LOST AVERAGE 20-CLIENT FIRM	RESUBMISSION RATE UNSTRUCTURED CHANNELS	AVG TOUCHES PER DOCUMENT

Run the live version with your exact numbers at **Document Chasing Calculator**. The calculator breaks down cost by category, including reminder time, status management, and resubmission handling separately. To evaluate your firm's software gaps and workflow bottlenecks, you can also run our free **Practice Audit**.

SECTION 02

Why Clients Don't Send Documents On Time

It is almost never what firms assume. All three causes are fixable in the collection process itself.

The instinct is to treat late submission as a client character problem. Some clients are organised; some are not. That framing feels true and it leads directly to a dead end — because you cannot change who your clients are. What you can change is the process you put in front of them.

Research on deadline behaviour and friction reduction points to the same three structural causes, consistently, across professional services firms of every size.

REASON 01

"I opened the portal, hit a login screen, and gave up."

Your client interacts with your portal once or twice a year. They do not remember which email address they used to set up their account. They do not remember their password. The "forgot password" flow requires an email they may not check immediately. At any one of those steps, a willing client becomes a non-submitting client — and they do not tell you what happened. They just go quiet.

REASON 02

"I didn't know exactly what you needed."

Vague requests produce nothing or produce the wrong thing. "Send me your financial documents" requires the client to interpret what counts, which accounts, what date range, what format, and what constitutes a complete submission. That is four interpretive decisions before they have uploaded a single file. Ambiguity resolves as deferral.

✕ "Can you send over some bank statements when you get a chance?"
✓ **"Please send your Jan–Dec 2024 Chase Business Checking statements in PDF format, downloaded from your bank portal, all pages."**

REASON 03

"There wasn't a deadline that felt real."

"When you get a chance" has an implied deadline of never. Research on deadline salience shows that motivation to complete a task increases sharply as a specific deadline approaches and declines rapidly as it recedes. Even a soft date like "by the 15th" changes behaviour because it gives the client something to plan toward. A deadline without a consequence is a suggestion.

THE REFRAME THAT CHANGES EVERYTHING

If your completion rate is below 80%, the overwhelming majority of late submissions are caused by one of these three structural problems, not by client character. Every one of them is fixable in the collection process itself, without requiring different clients. If you need to define clean engagement boundaries and scope limits before starting client collection, use our free **Engagement Letter Builder**.

SECTION 03

The System That Fixes It

Five steps you can implement this week. Works with any tool — or no tool at all.

1

BATCH YOUR REQUESTS

Choose one fixed day per month as your request day — the 1st works well for most firms. All document requests go out on the same day, all with the same deadline (the 20th, for example). Batching creates predictability: clients develop expectations about when requests arrive, your team stops managing scattered deadlines, and reminders become grouped rather than scattered across the month.

2

BE SPECIFIC IN EVERY REQUEST

Every document request should name the exact document, the date range, the format, and where to send it. Remove every interpretive decision from the client. If they have to guess, they will either guess wrong or defer until they can ask you, which defeats the purpose of sending the request. To easily generate custom checklist templates with download paths for e-commerce, real estate, or payroll clients, use our free **Document Request Template Generator**.

✕ Bad: "Can you send over some bank statements?"
✓ **Good: "Please send your Q1 2024 Chase Business Checking statements (Jan, Feb, Mar) in PDF format, downloaded from your bank portal."**

3

SET A REMINDER SCHEDULE BEFORE YOU SEND

Decide your reminder cadence before the request goes out, not when you notice something is missing. The standard sequence for monthly bookkeeping documents:

DAY 0	DAY 10	DAY 17	DAY 21
Request sent	First reminder — specific items listed	Final reminder — deadline stated clearly	Direct call if nothing received

4

SEPARATE THE REQUEST FROM THE RELATIONSHIP

Reminder emails are operational, not personal. Write them once as templates. Never personalise them beyond the client name and missing items, it wastes time and makes the process dependent on your mood. A system that runs the same way every month, regardless of which client it is, is what makes this scalable. The relationship is in the work. The reminders are logistics. To run the exact math on a client's hourly consumption vs. their monthly retainer, you can use our free interactive **Client Profitability Analyzer**.

5

TRACK STATUS VISIBLY

Even a simple spreadsheet with Client / Document / Sent / Received / Chased columns is better than tracking this in your head or your inbox. Visibility turns a vague anxiety into a manageable list. When you can see exactly what is outstanding for which client, follow-up becomes targeted — not a sweep of the whole inbox hoping you haven't missed anything.

Minimum viable tracking: Client name | Request sent | Deadline | Status (sent / partial / complete) | Last action taken

SECTION 04

What This Looks Like With the Right Tool

One paragraph. One link. No sales deck.

If you want to run the system above without managing the steps manually, Quire handles it automatically — clients receive a magic link (no login, no account creation required), reminders fire on your configured schedule and stop the moment a client submits, and the dashboard in Step 5 updates in real time across all clients simultaneously. You can try it free at **withquire.com**. No card required. Takes about 10 minutes to set up a first portal. But even if you don't, the system above works.

FREE PLAN — NO CARD REQUIRED

Start with one client.
See the difference in one week.

Magic link portals. Automated reminders that stop when clients submit. Real-time dashboard across all clients. Built for firms where the principal feels the document chasing pain personally.

withquire.com →

SECTION 05

Resources You Can Use Today

All of these are free. All are live on the Quire website.

- **Document Chasing Calculator**
  withquire.com/free-tools/document-chasing-calculator/
- **Document Request Template Generator**
  withquire.com/free-tools/document-request-template-generator/

- **Interactive Practice Audit**
  withquire.com/free-tools/practice-audit/
- **Engagement Letter Builder**
  withquire.com/free-tools/engagement-letter-builder/
- **Bookkeeping Fee Calculator**
  withquire.com/free-tools/bookkeeping-fee-calculator/
- **Tax Prep Fee Estimator**
  withquire.com/free-tools/tax-prep-fee-estimator/
- **Client Capacity Planner**
  withquire.com/free-tools/client-capacity-planner/
- **FTC Safeguards Compliance Checker**
  withquire.com/free-tools/ftc-safeguards-compliance-checker/
- **Client Profitability Analyzer**
  withquire.com/free-tools/client-profitability-analyzer/