Onboarding New Clients With Confidence

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Cloud Process Creator

[Calmwaters Cloud Accounting]

I want every accounting professional to love cloud accounting as much as I do, so I craft processes and automation for future-thinking accounting professionals who believe in the mightiness of online technology.

Certified or partnered in over a dozen cloud applications, I'm also a proud member of the **Intuit International Trainer Writer Network** , Alumni of the **FreshBooks Partner Council** and the **LeaderBean of the Financial Cents Ambassador Program**.

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Today we are going to noodle through crafting an onboarding process that bridges the prospect to happy client relationship!

Agenda

Three key thoughts to begin building an onboarding workflow

7 bridges of your onboarding system

Simple automations to implement

Onboarding tech stack

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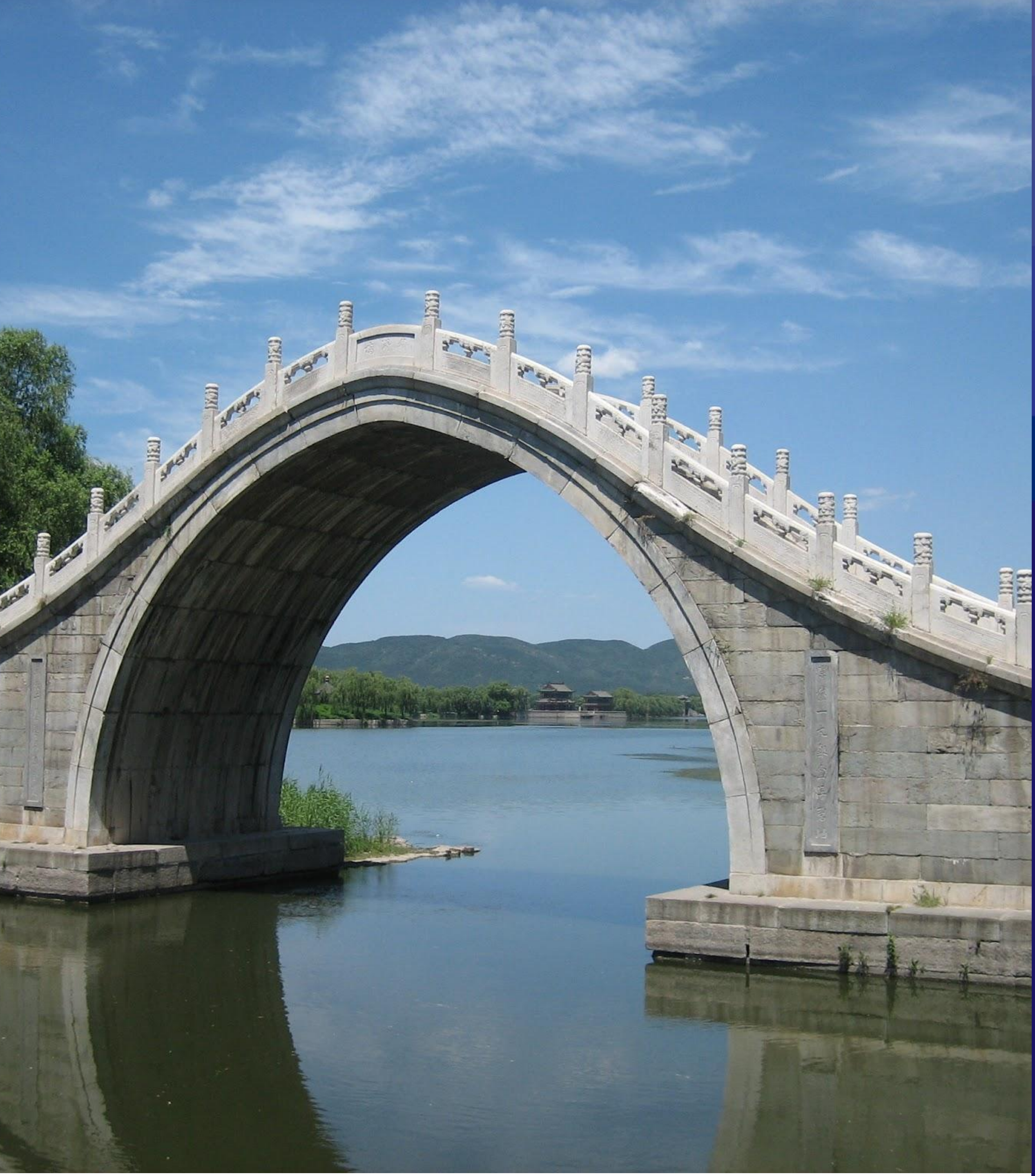

Why you need an onboarding workflow

- You set the client expectations
- You aren't wasting time with misfits
- You don't need to go back to them in dribs & drabs
- You have all the information you need located in a single place

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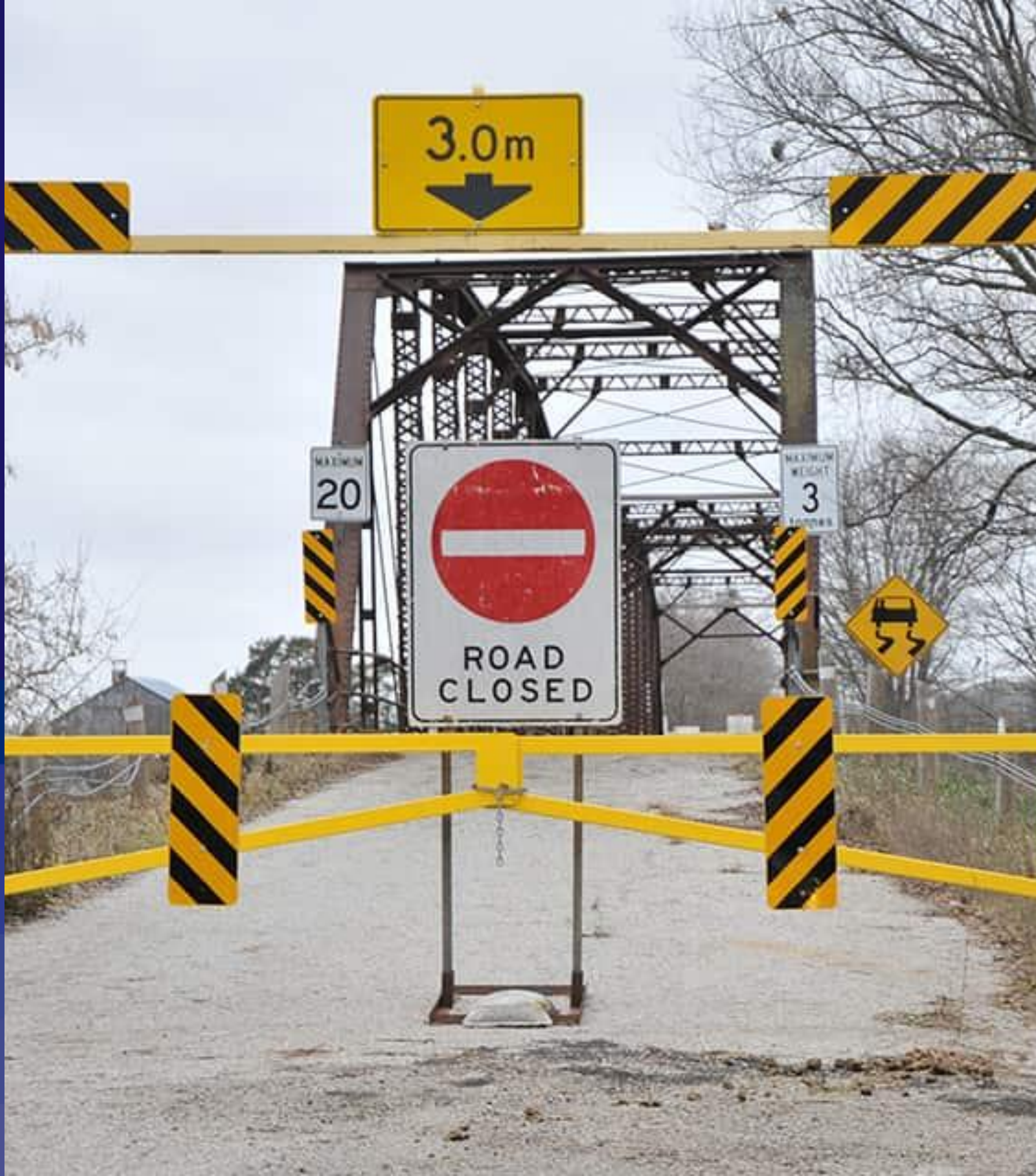
You start the relationship off on an organized, collaborative, and professional high note.

Key thoughts to building an onboarding workflow

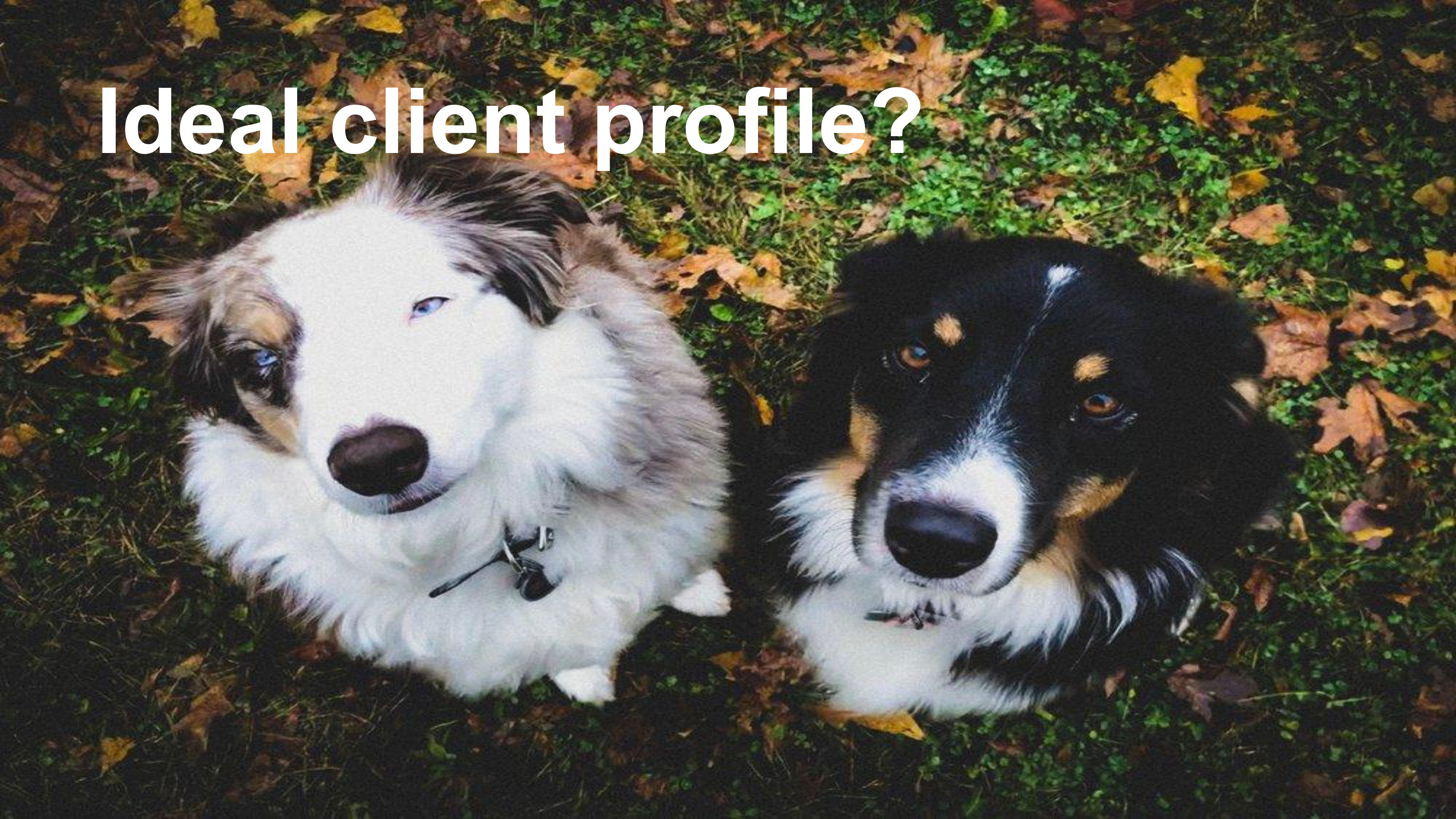
Define your outcome

Craft a collaboration guide!

Define your ideal client



Ideal client profile?



Define the order of your bridges.

And don’t cross them in the wrong order!

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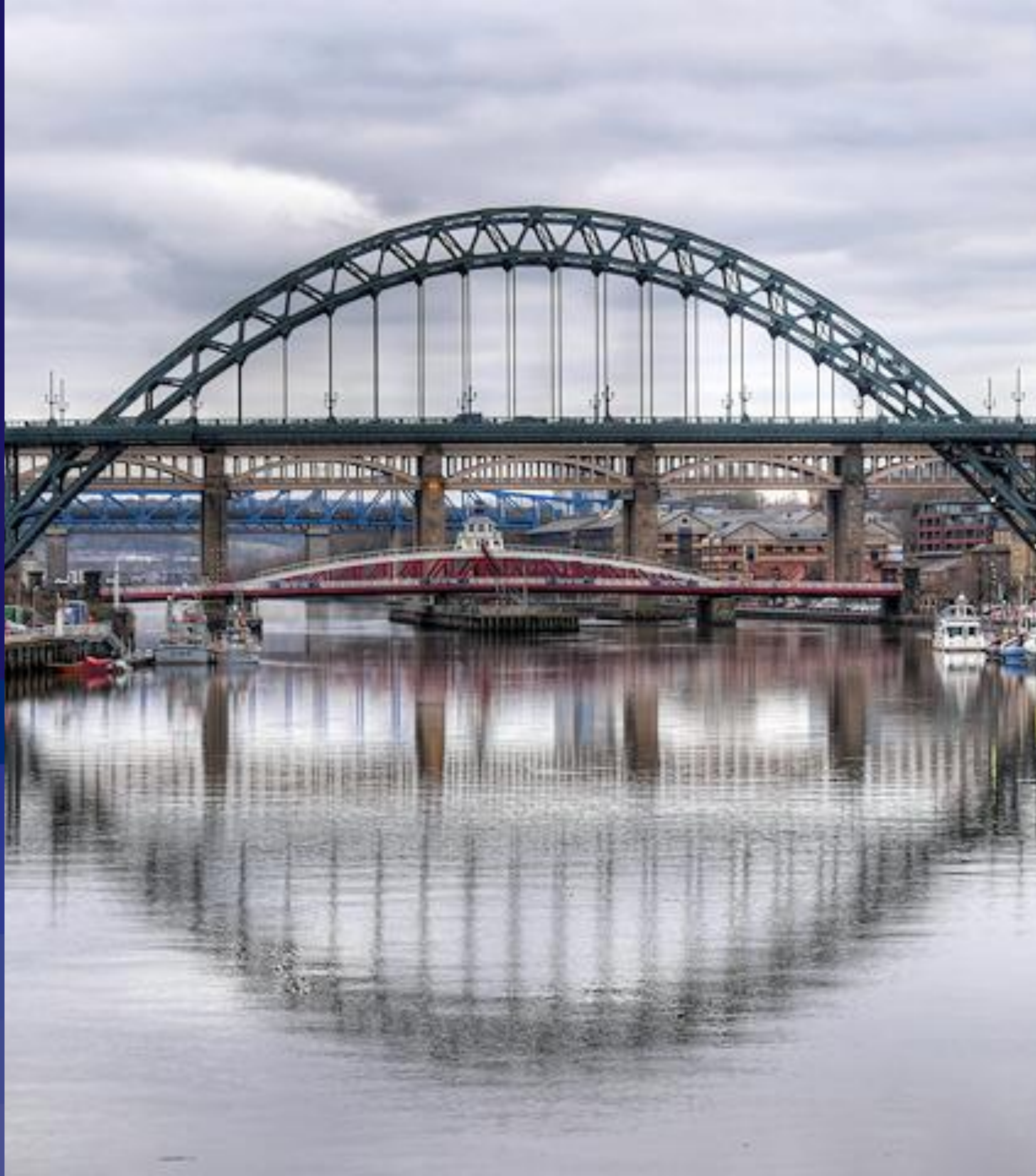
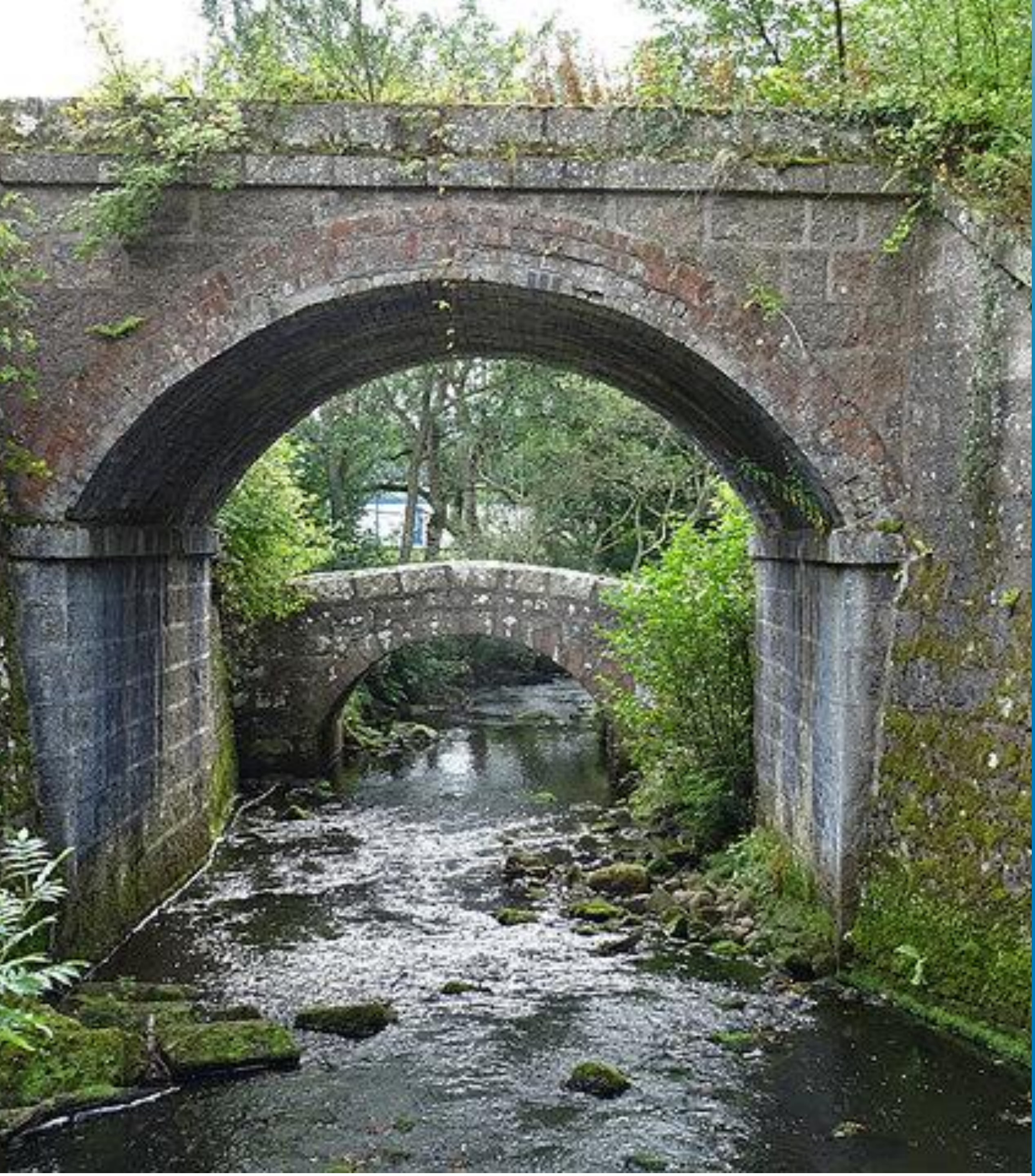
1. Lead generation and discovery

This is possibly the most important bridge of your onboarding workflow

- Vet the tire kickers
- Don’t get into the time suck of mis-fits





2. File review

This is a key bridge

- DON'T NOT DO THIS!
- QBO overview and file review is fantastic for this
- Check for non-posting transactions

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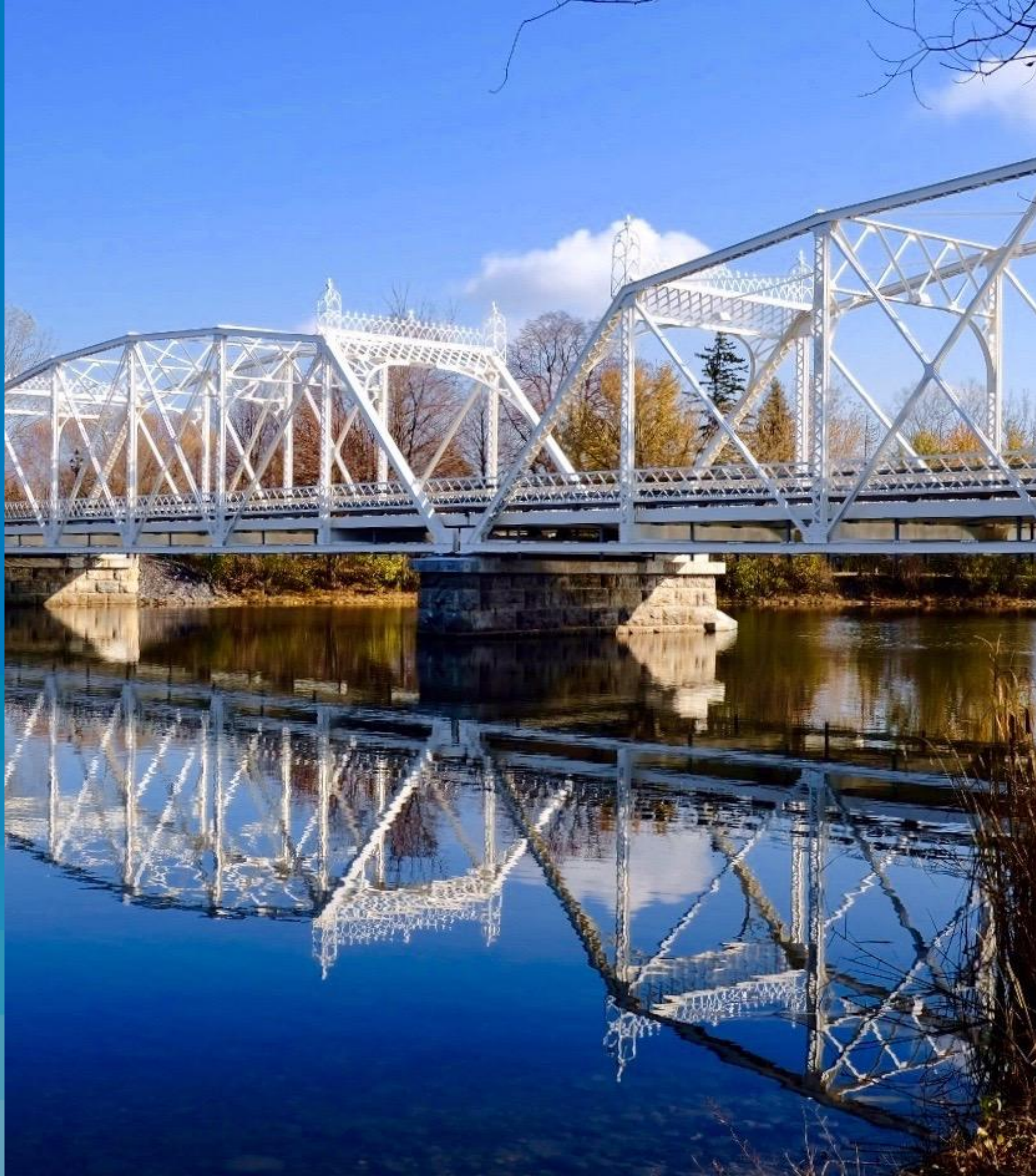
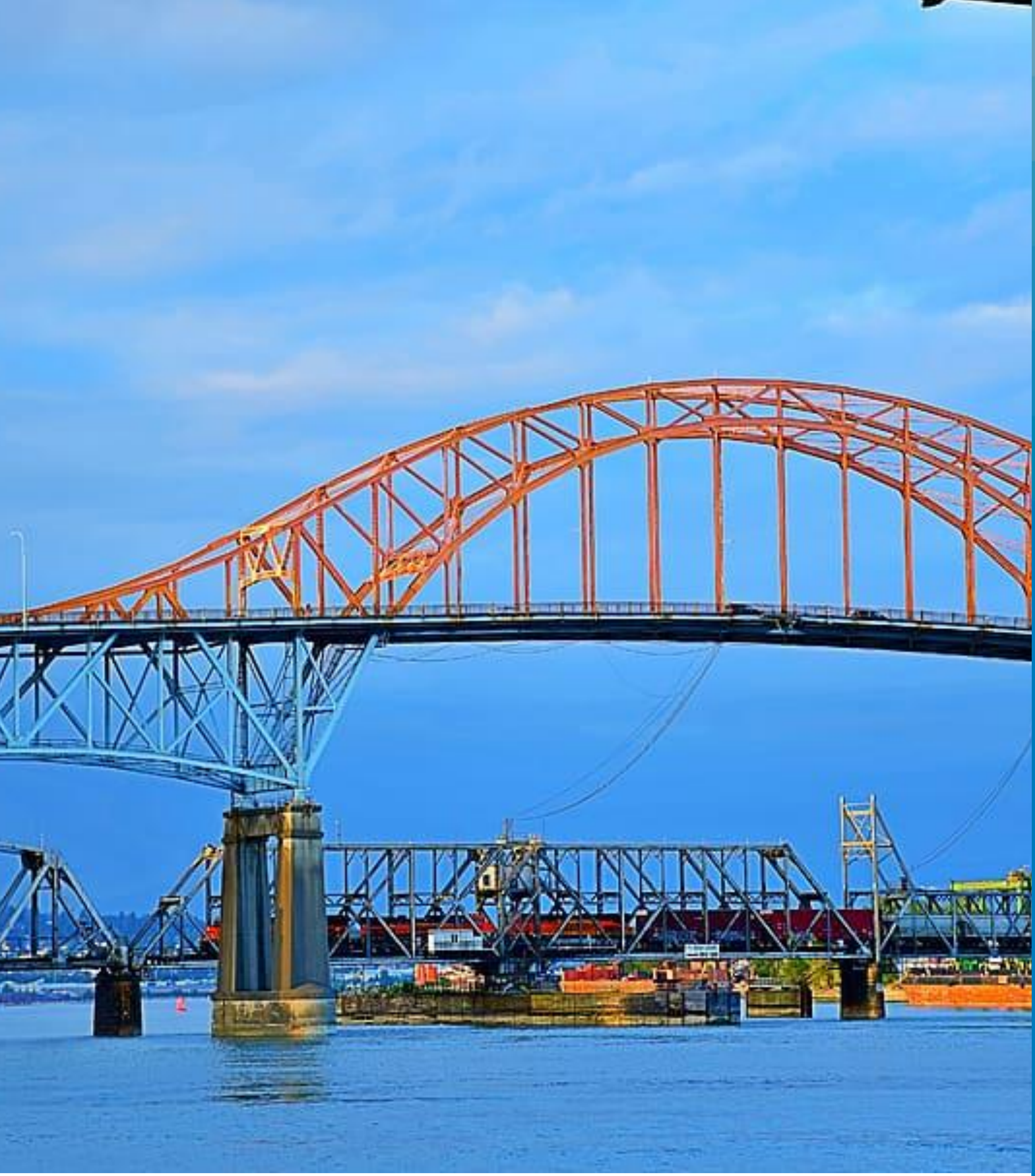
3. Quote

Often the engagement letter is part of this

- Have a disengagement clause if they don't get through the information gathering stage





4. Information gather

If they don't get over this bridge, end the process

- Sign of future collaboration

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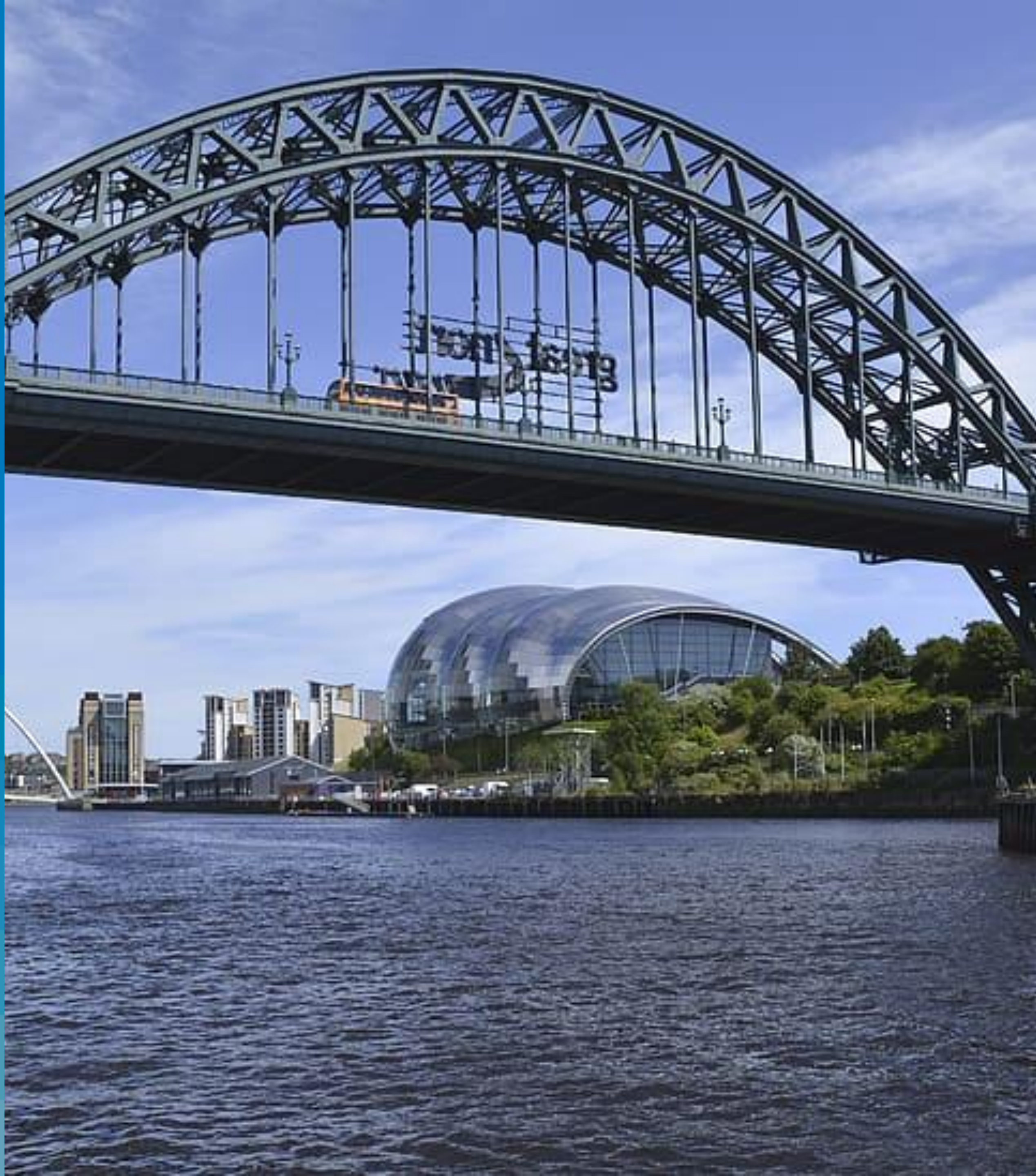
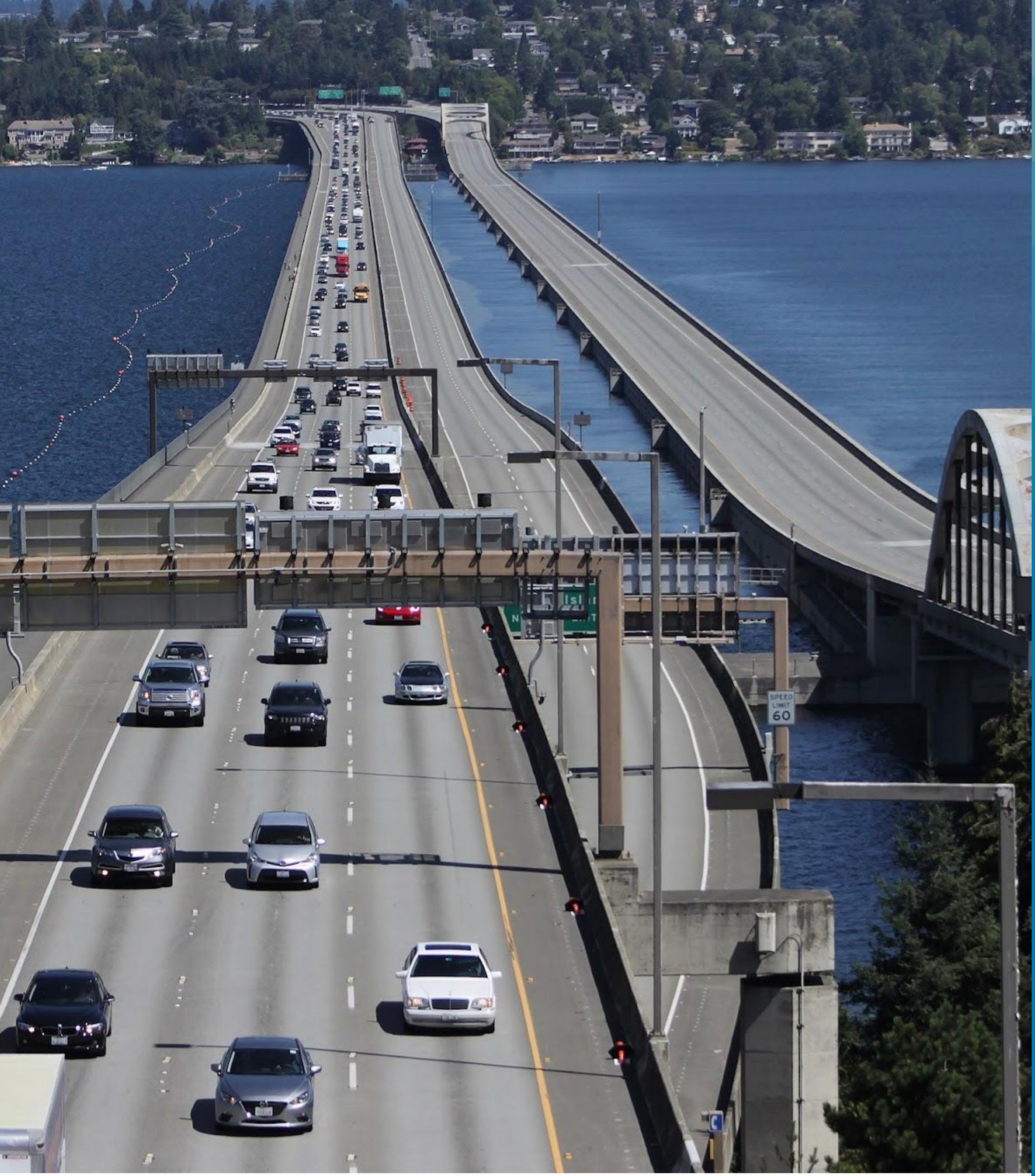
5. Engagement

State apps, timelines, out of scope work

- Possibly use a 3 or 6 month month engagement if scope of work is hard to assess





6. App implementation

Do they come to you with the tech or do you need to set it up

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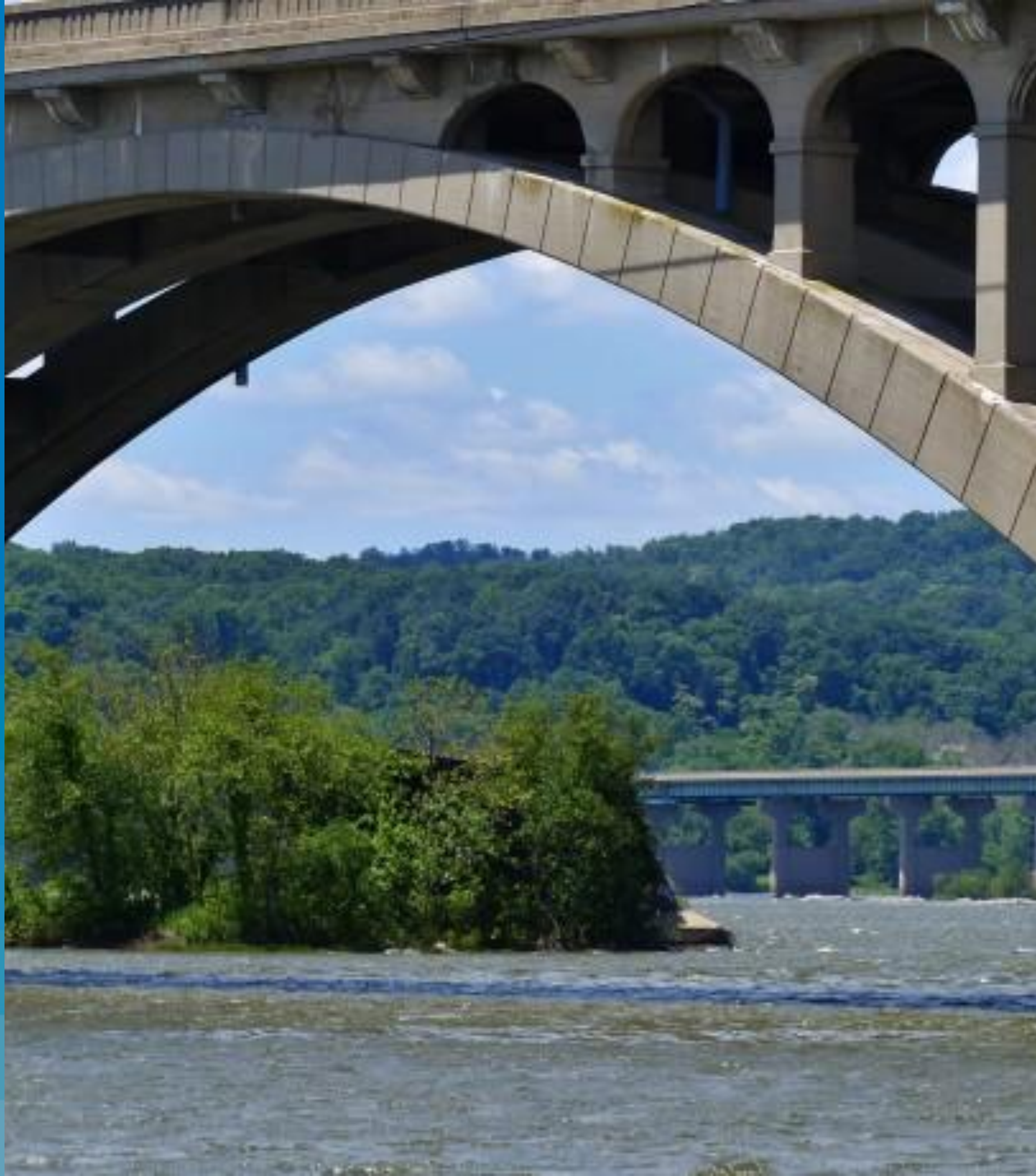
7. Education

Spend upfront time here for big overall gains

- App confidence
- Communication and sharing collaborations



Simple automations to implement

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Automation decision matrix

Can you delegate to someone without concern for the outcome?

Are you that confident in the process?

Is it a repeatable process?

The same outcome and process every time?

Does the automation benefit outweigh the consequences of an automation fail?

Will fixing a fail be embarrassing and/or time consuming?

Simple, low fail automations

1. Discovery form
    a. Is accessible without you
        i. Website, social media
    b. Vets for who can book with you
    c. Blocks your scheduler
2. Online scheduler
    a. Integrates with CRM, QBO…
3. Drip campaigns to send out forms

Onboarding tech stack

Onboarding tech stack

Form builder	Checklist	Signature app	Storage folder
Lead capture Discovery Information gather Re-engagement survey	Workflow	Contracting	Document sharing

Onboarding tech stack

Of course you need a way to communicate!

- Generally this would be email in the beginning but you can move to apps if the fit is great
- Financial Cents, Liscio, Slack, Teams

Onboarding tech stack

Form builder	Checklist	Signature app	Storage folder
Google forms	Spreadsheet	Liscio	GDrive
Typeform	Financial Cents	Docusign	Sharefile
Cognito forms	Karbon	Right Networks	Liscio
	Asana	PandaDoc	OneDrive
Taxdome	Taxdome	Taxdome	Taxdome
17Hats	17Hats	17Hats	

AI Prompts From Ashley Frances!

Help me define my ideal client

Hi ChatGPT! I am a [Your Profession]. You are an ideal client creation bot. I want to define my ideal client in the areas of tech stack, services, entity type, collaboration styles, demographic and geography. Step 1 will be for you to ask me questions about my practice that will help you understand my practice and preferences. Step 2 will be, once I answer those questions, we will go through each area, one-by-one and you will ask me follow up questions specific to that area. Step 3 will be once we've gone through all six areas, you will create an ideal client outline with each area bolded as a header and the ideal client features for that area listed in bullet points below.

Create a Discovery Form

Hi ChatGPT! I am a [Your Profession]. You are a prospect questionnaire creation bot that will help me create a questionnaire to weed out prospects that don't meet my ideal client model. I have created my ideal client model based on the following criteria: tech stack, services, entity type, collaboration styles, demographic, and geography. Step 1 – I will paste in my ideal client model and you will list out questions from most relevant to least relevant, that would work best for filtering through prospects as a table, with column 1 being the criteria category, column 2 being the question type (closed ended, open ended, multiple choice, etc), column 3 being the question and column 4 being the answer options if multiple choice or ranked choice. Step 2 - I will choose a criteria category that I want to create more questions around and you will create a table specifically for that category, similar to the table in Step 1.

Craft a Discovery Form Email

Hi ChatGPT! I am a [Your Profession]. You are a professional email creation bot. Please create a friendly but professional email template with only 200 words that we can use with prospective clients to send a prospect questionnaire. Please use the voice of [Voice to Use (example: Michelle Obama)] to craft the email but please don't directly reference [Person's Voice] in the email.

Summary

We looked at three considerations before building an onboarding workflow

We defined 7 bridges of your onboarding system

We showed simple automations to implement

We looked at what should be in your onboarding tech stack

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I craft processes and automation for future-thinking accounting professionals who believe in the mightiness of online technology.

If you know what you would like to simplify, techify or problem solve, let's get on with it.

These are "love-em-and-leave engagements", getting specific actionables completed in targeted sessions - of course, we can go out for more than one date :-}

It's all about you - we can cover whatever you want.

Book with me

Cloud Accounting & Bookkeeping Templates, Workflows, Communications, SOP & Client Guidebooks.

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Thank you

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