



Perfecting the client onboarding experience

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Meet your host



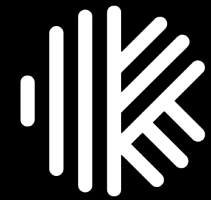
Ian Vacin

Karbon
Chief Customer Officer



- 1. Close down any open apps**
- 2. Ask and we'll answer**

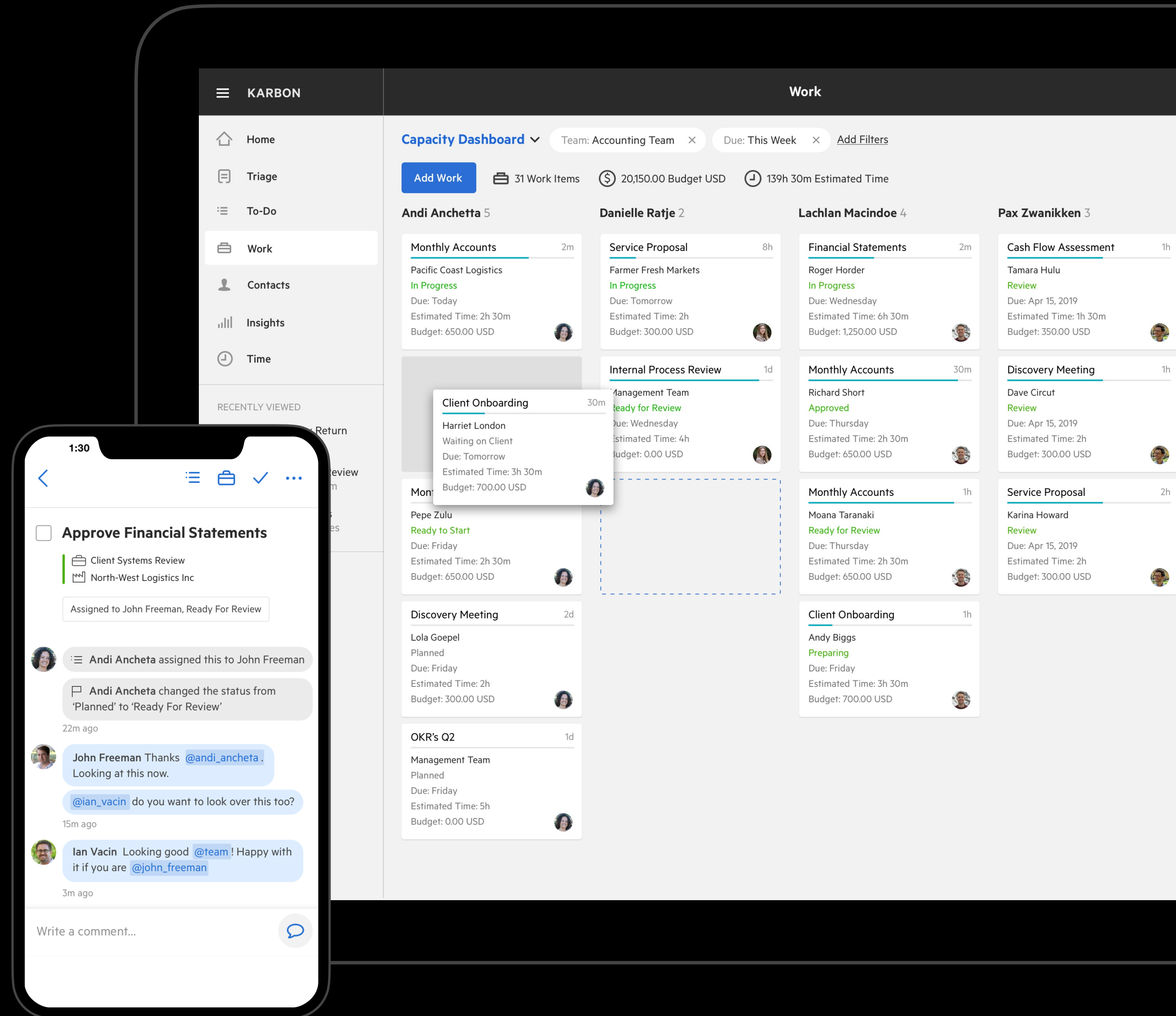




Work Management Software *for* Accounting Firms

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GET STARTED



“Without a defined process, we were in reactionary chaos. Now, we are regularly doing 6-8 onboardings a month without a hiccup.”

— Zach Cochran, Two Roads, Director of Experience



- 1. Onboarding 101**
- 2. The workflow**
- 3. Walk-through**
- 4. Tips and tricks**



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The facts about client onboarding



The problems:

- Email is painful
- Clients drag their feet
- Client portals become dust-covered
- eOrganizers become doorstops

Most firms take >60 days to fully onboard.
Best firms take <30 days.

3Cs of lag time:
Chase, coordination and communication.

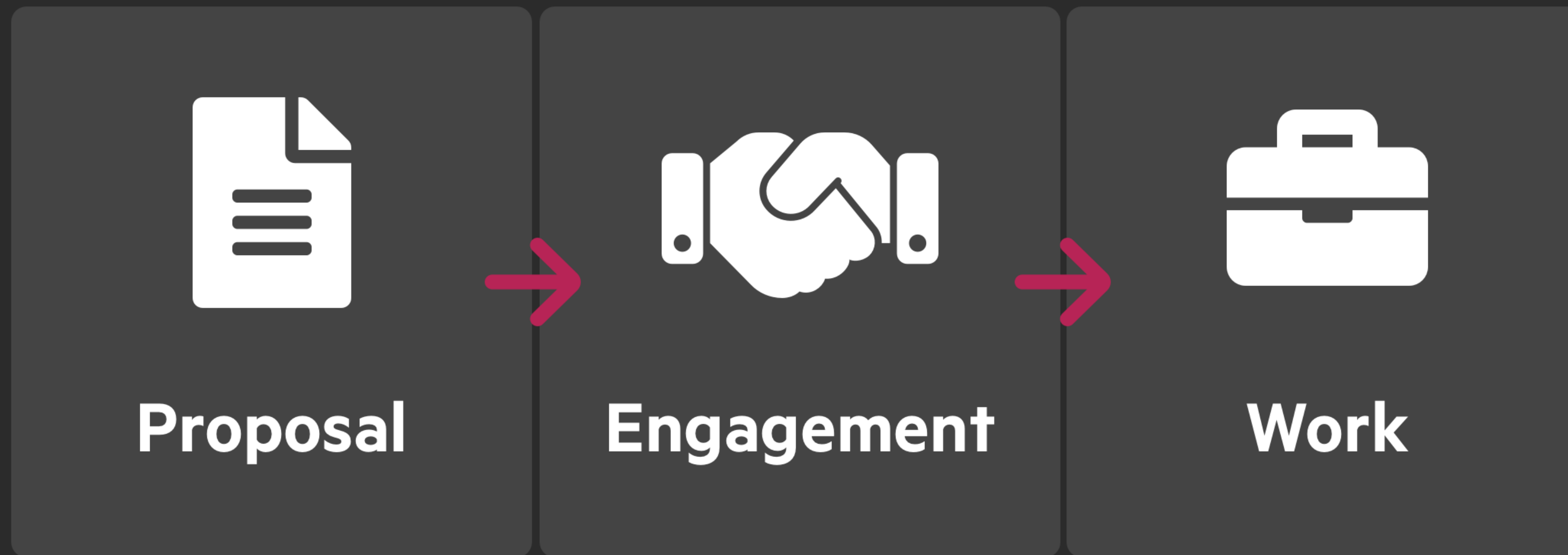


The keys to effective onboarding

- Seamless setup
- Collect the info
- Manage the client
- Use a flexible plan



#1: Seamless setup

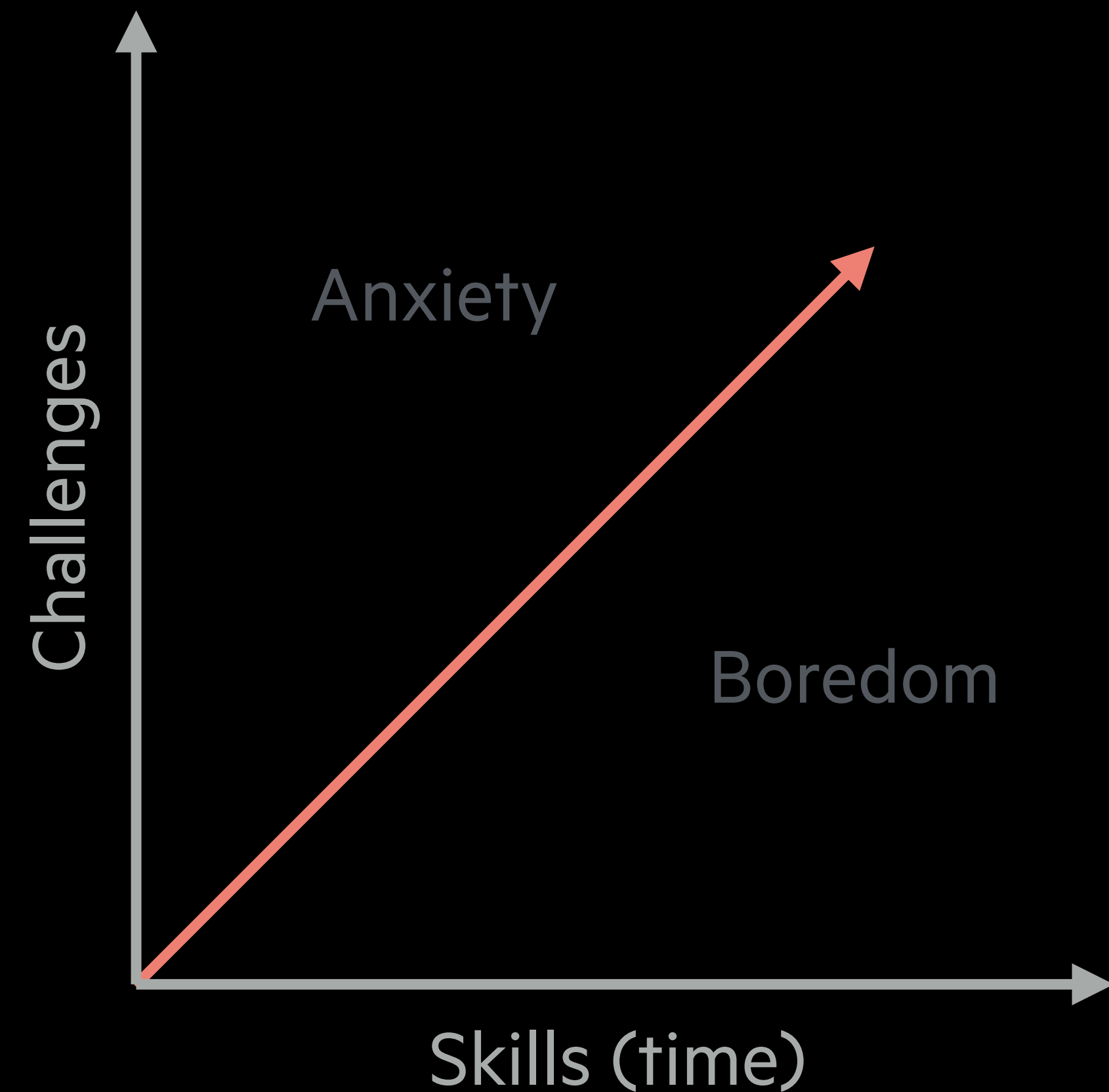


Leverage integrations with GoProposal and Practice Ignition to create the work.



#2: Collect the info

- Get info progressively
- Validate (when possible)
- Set a goal and critical path
- Be clear on deadlines & penalties
- Make it easy for the client
- Collect & capture as you go



#3: Manage the client

- Set expectations upfront
- Be clear on how you will collaborate
- Train clients on how to work with you
- Provide your standard operating procedures
- Dedicated onboarding resource / time



#4: Use a flexible plan

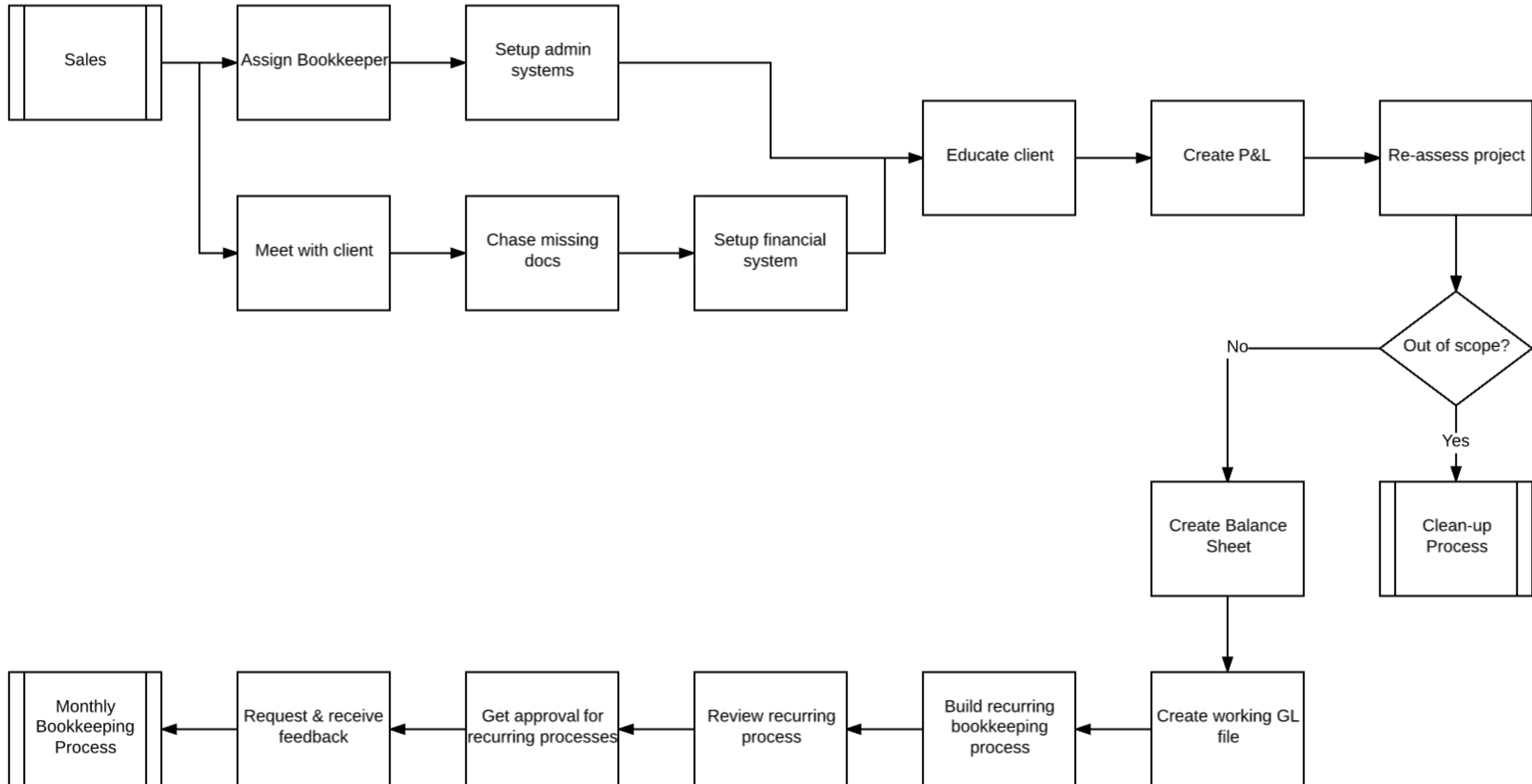
- Engage the client immediately from the start
- Collect & capture as you go
- Get critical info from the start, and piecemeal thereafter
- Overbake your workflow
- Make it easy to personalize to the client
- Build in the chase
- Use phases to break up the job logically
- Ensure continuity to other processes



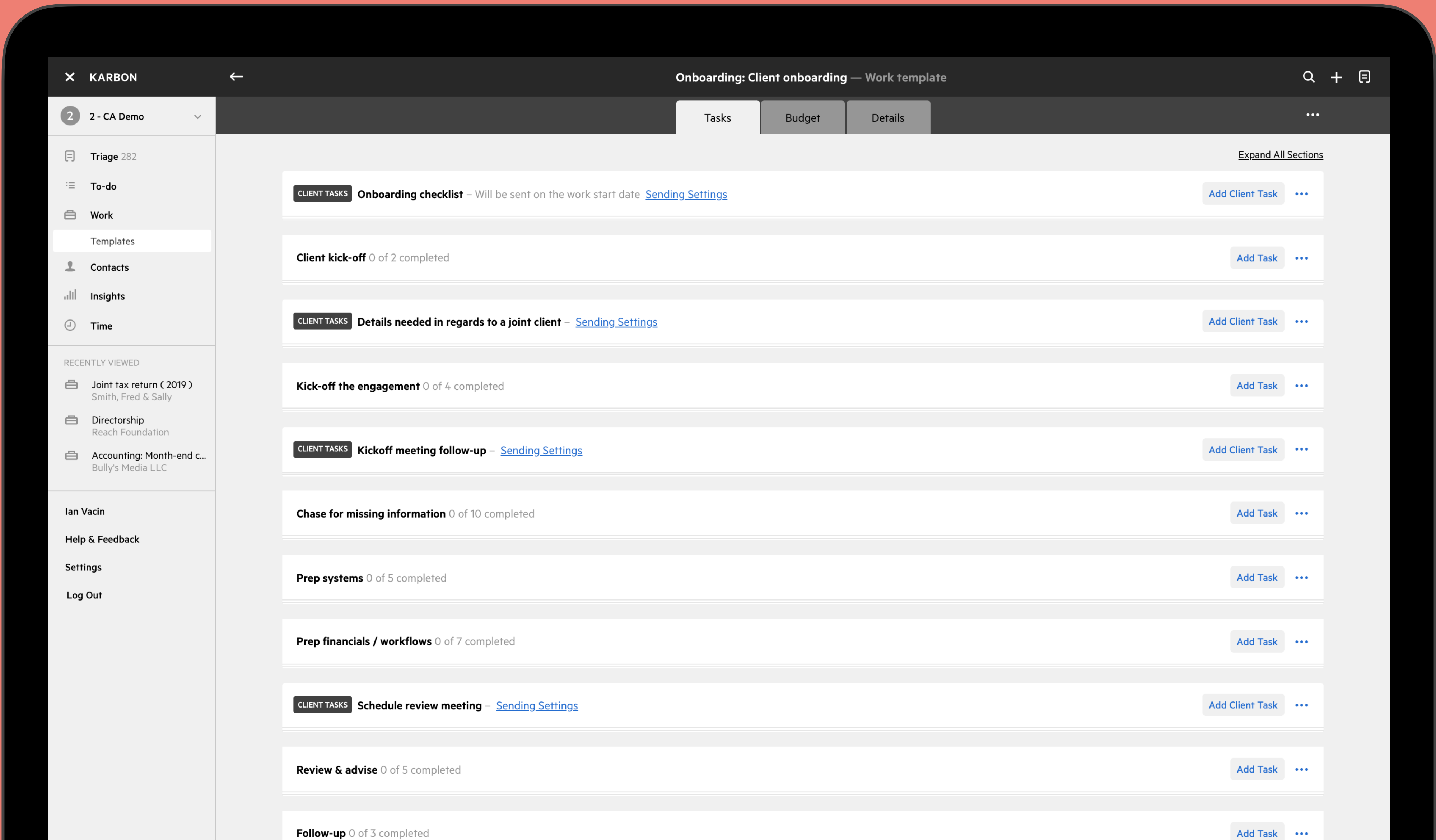
1. Onboarding 101
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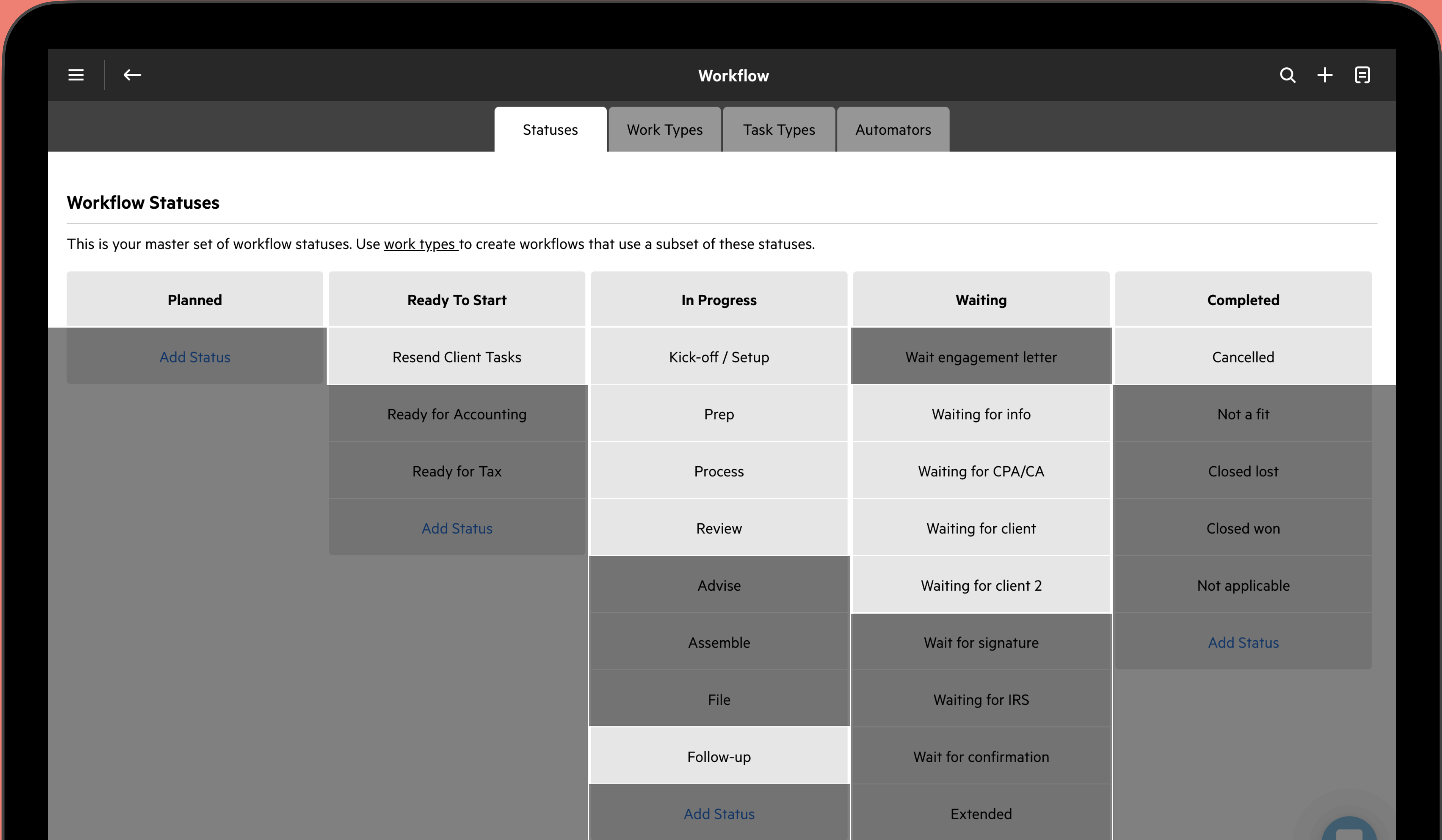
Workflow example



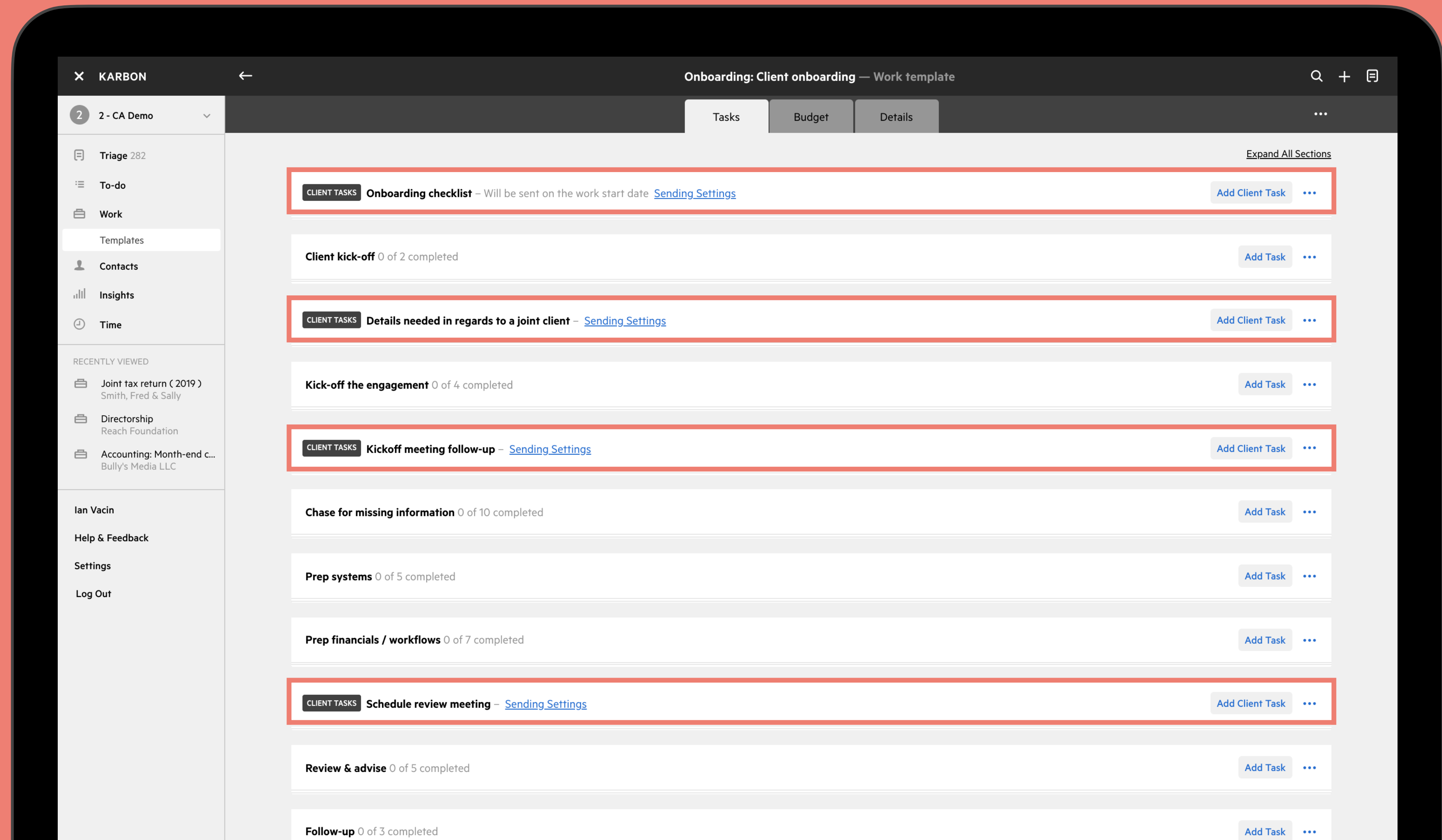
Break the onboarding process into its phases (e.g. workflow statuses).



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Build in the expected client interactions to eliminate lag time.



Build in the expected client interactions to eliminate lag time.

The image shows a mobile application interface with two modal windows overlaid on a background screen. The background screen displays a task management interface with tabs for 'Tasks', 'Budget', and 'Details'. It includes a search bar, a list of tasks, and buttons for 'Add Client Task' and 'Add Task'. The 'Sending Settings' modal is on the left, and the 'Client Task Auto-Reminders' modal is on the right.

Sending Settings

SEND TO

Abigail Silvers

FROM

Work assignee

☐ Send tasks now

☒ Schedule tasks to auto send later

[Edit Email](#)

[Cancel](#) [Next](#)

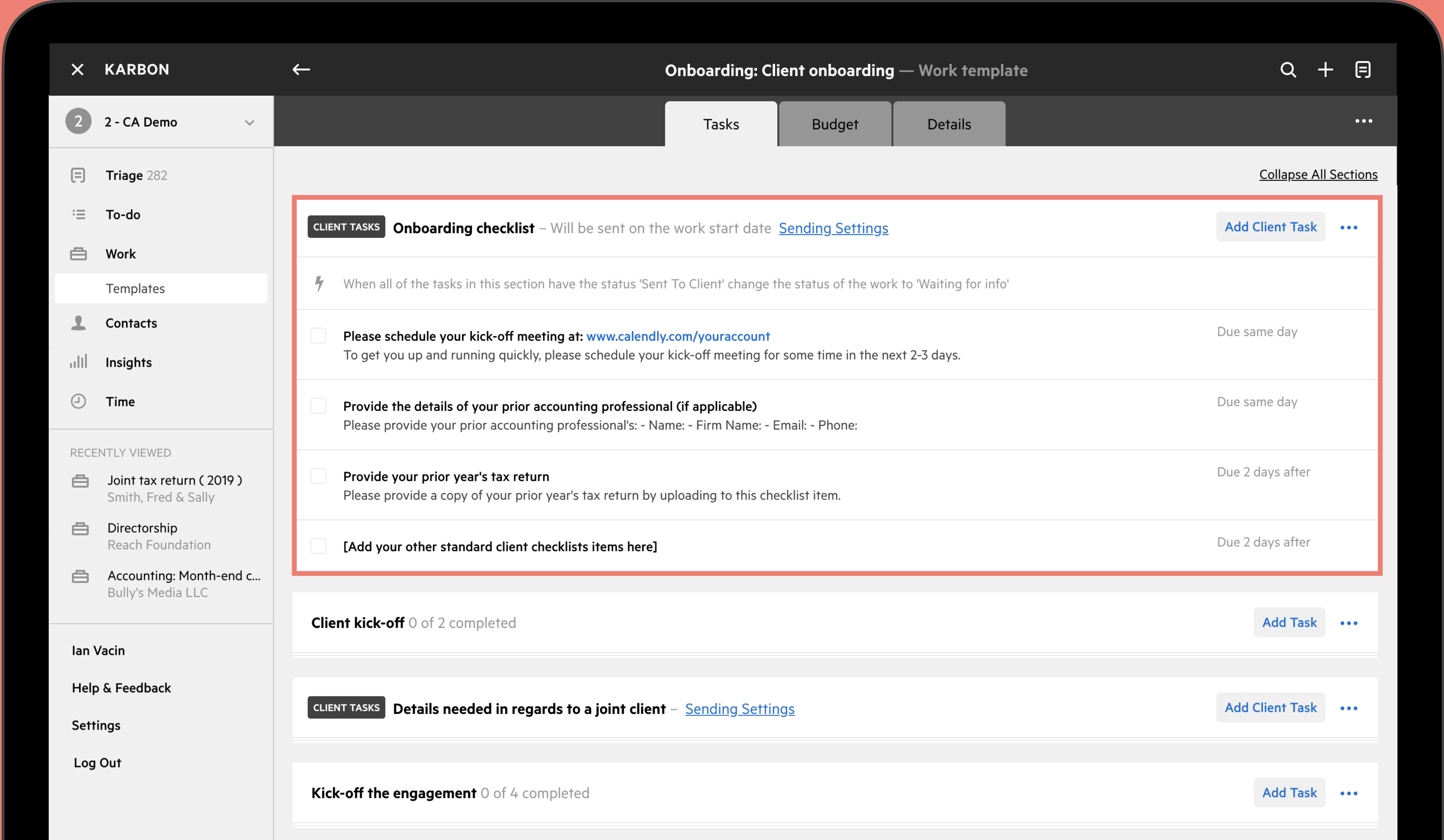
Client Task Auto-Reminders

☒ Automatically send [Gentle Reminders](#)

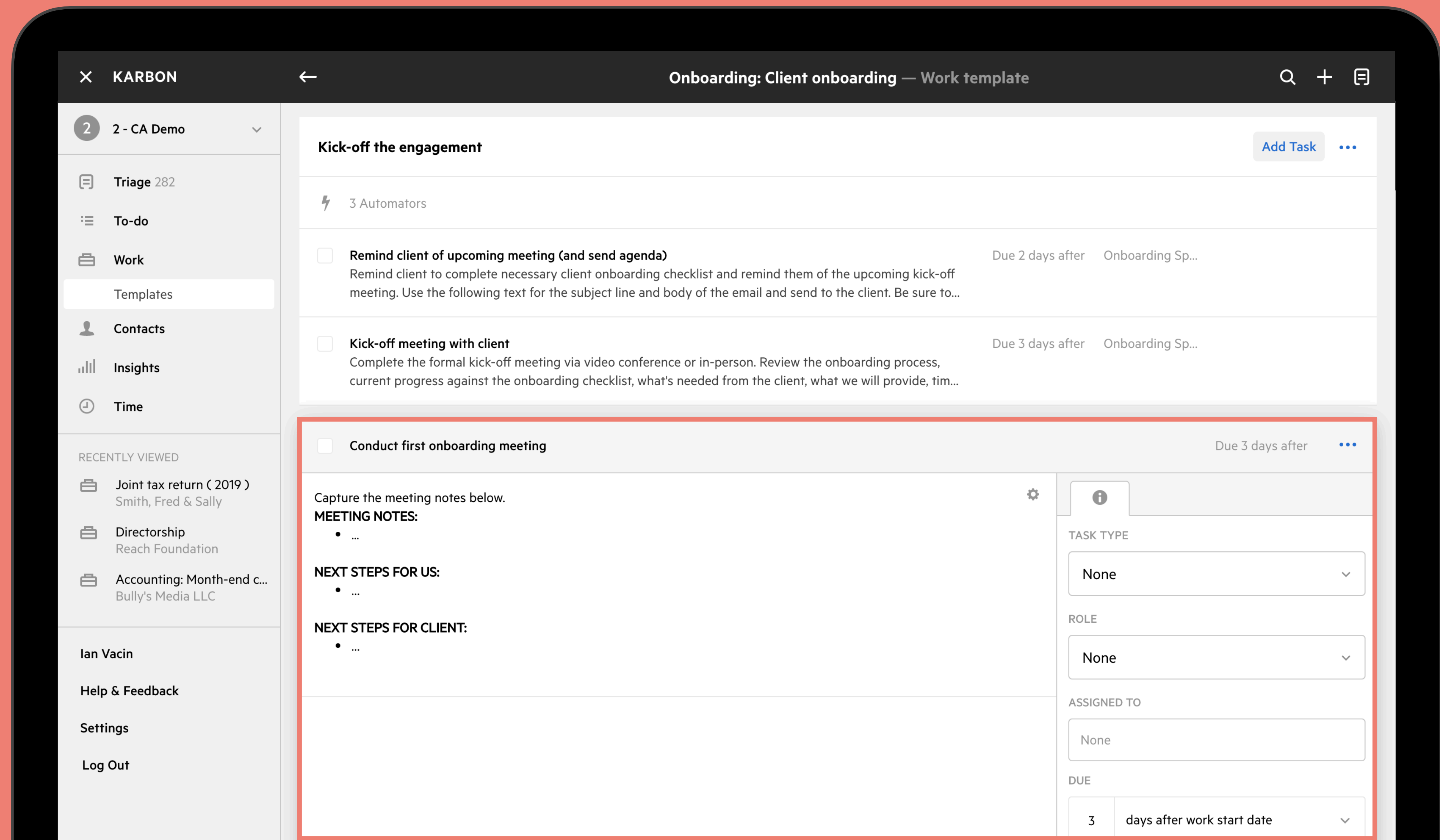
- ☒ Reminder 7 days before task due-date
- ☒ Reminder on task due-date
- ☒ Daily reminder when overdue

[Save](#)

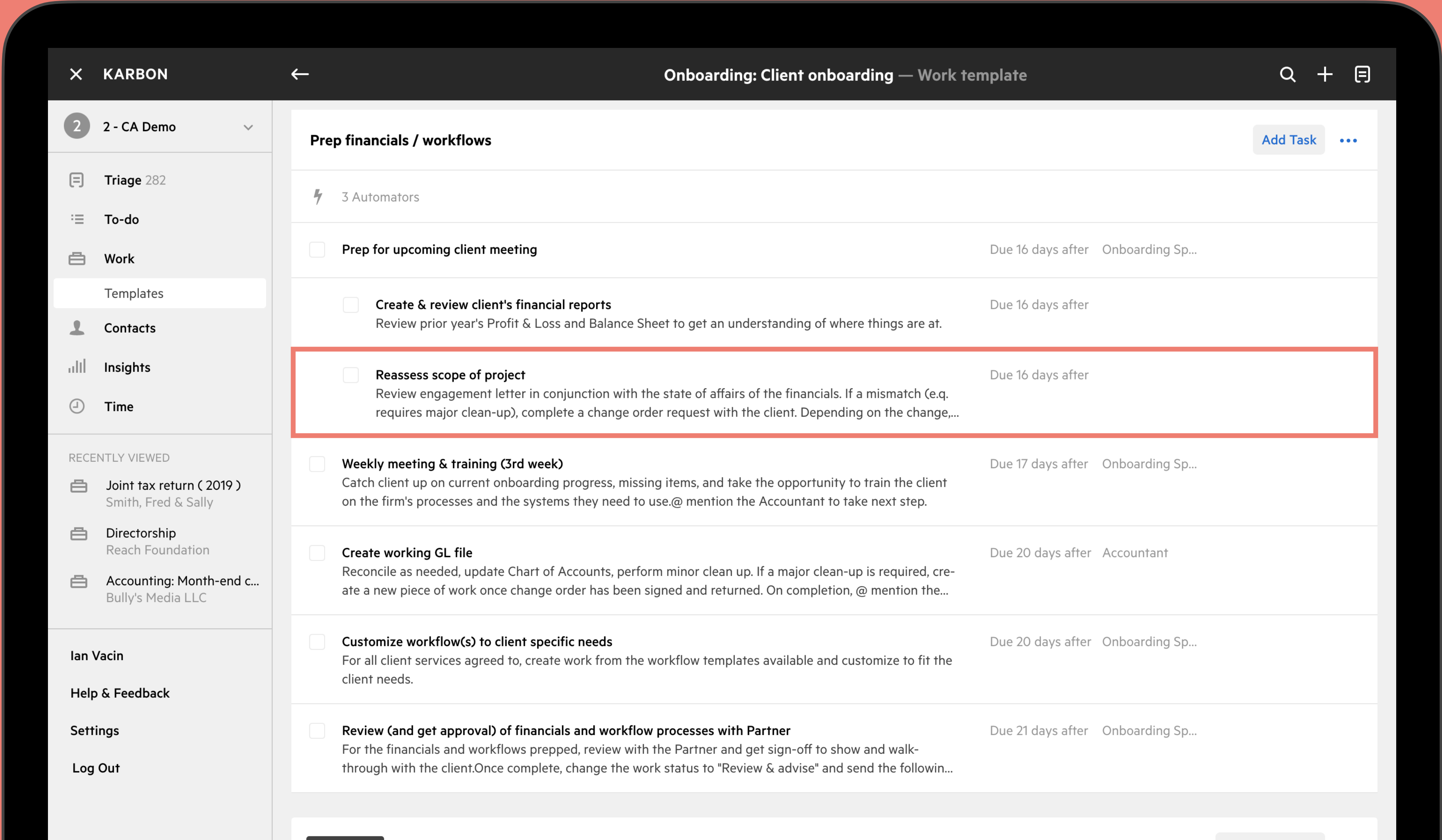
Get critical information immediately from the client at the start.



Build in the capability to track the details in descriptions and comments.



Build in tollgates and the ability to handle the unexpected.



Enable the continuity of work to go from onboarding to sold services.

KARBON

Onboarding: Client onboarding — Work template

2

2 - CA Demo

Triage 282

To-do

Work

Templates

Contacts

Insights

Time

RECENTLY VIEWED

Joint tax return (2019)
Smith, Fred & Sally

Directorship
Reach Foundation

Accounting: Month-end c...
Bully's Media LLC

Ian Vacin

Help & Feedback

Settings

Log Out

Review & advise

Add Task

3 Automators

Remind of review meeting (and send agenda)

Confirm review meeting and send meeting agenda.

Due 23 days after

Onboarding Sp...

Conduct final onboarding review meeting

Once complete, change work status to "Follow-up" and @ mention the Salesperson on completion for en-
gagement follow-up.

Due 24 days after

Onboarding Sp...

Prepare for review meeting

Prepare the presentation, agenda, and talking points for the review meeting.

Due 23 days after

Onboarding review meeting (with Partner)

Present the financials (P&L, Balance Sheet), systems setup, processes to follow and provide training
on what it means and where things go from here. Discuss KPIs that will be reviewed each month. Ask...

Due 24 days after

Post review meeting follow-up activities

Debrief with team on meeting summary, outcomes and lessons learned. Create or update all ongoing
work, workflows, KPIs and engagement details per client discussion. Move Karbon work into recurrin...

Due 24 days after

Follow-up

Add Task

4 Automators

Conduct post-review meeting call

Call client immediately after onboarding is complete to: 1) Give thanks 2) Administer the NPS/satisfaction
survey 3) Get a testimonial / referral / rating / review

Due 25 days after

Salesperson

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Introducing Karbon

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3. Walk-through
4. **Tips and tricks**



Five key workflow concepts to consider

1. **Hand-off:** Last task of sales is to create onboarding work.
2. **Client tasks:** Use for client meetings and info gathering. Pre-prep client tasks for send after key moments (e.g. meetings).
3. **System setup:** Use with parent task and unassigned sub-tasks.
4. **Task descriptions:** Pre-prep with agenda, meeting note capture, email contents, hand-offs, and multiple status changes.
5. **If/then:** Multiple options? Create both & provide details to delete. Spawned process? Put details in the task description.

Tips & tricks for effective onboarding

- **Give options:** Don't assume everyone learns the same way.
- **Be clear:** Lay out the engagement clearly upfront in terms of responsibilities and deadlines on both sides.
- **Question:** Ask lots of them - technical & non-technical.
- **Meet regularly:** Cadence reduces time and resolves issues.
- **Collaborate:** Start with clear roles & responsibilities and collaborate together to get the work done.

Tips and tricks for effective onboarding (*cont.*)

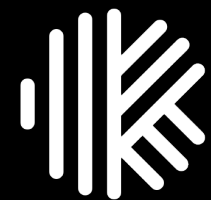
- **Expectations:** Get ahead of things. Set clear expectations with the client from the start.
- **Communication:** Do it early and often—it's that simple.
- **Process:** Spend the time to build a clean, simple, effective, repeatable, and manageable process in place. Iterate over time.
- **System:** Get a system to automate the onboarding process to ensure you aren't in reactionary chaos.

Wrap up

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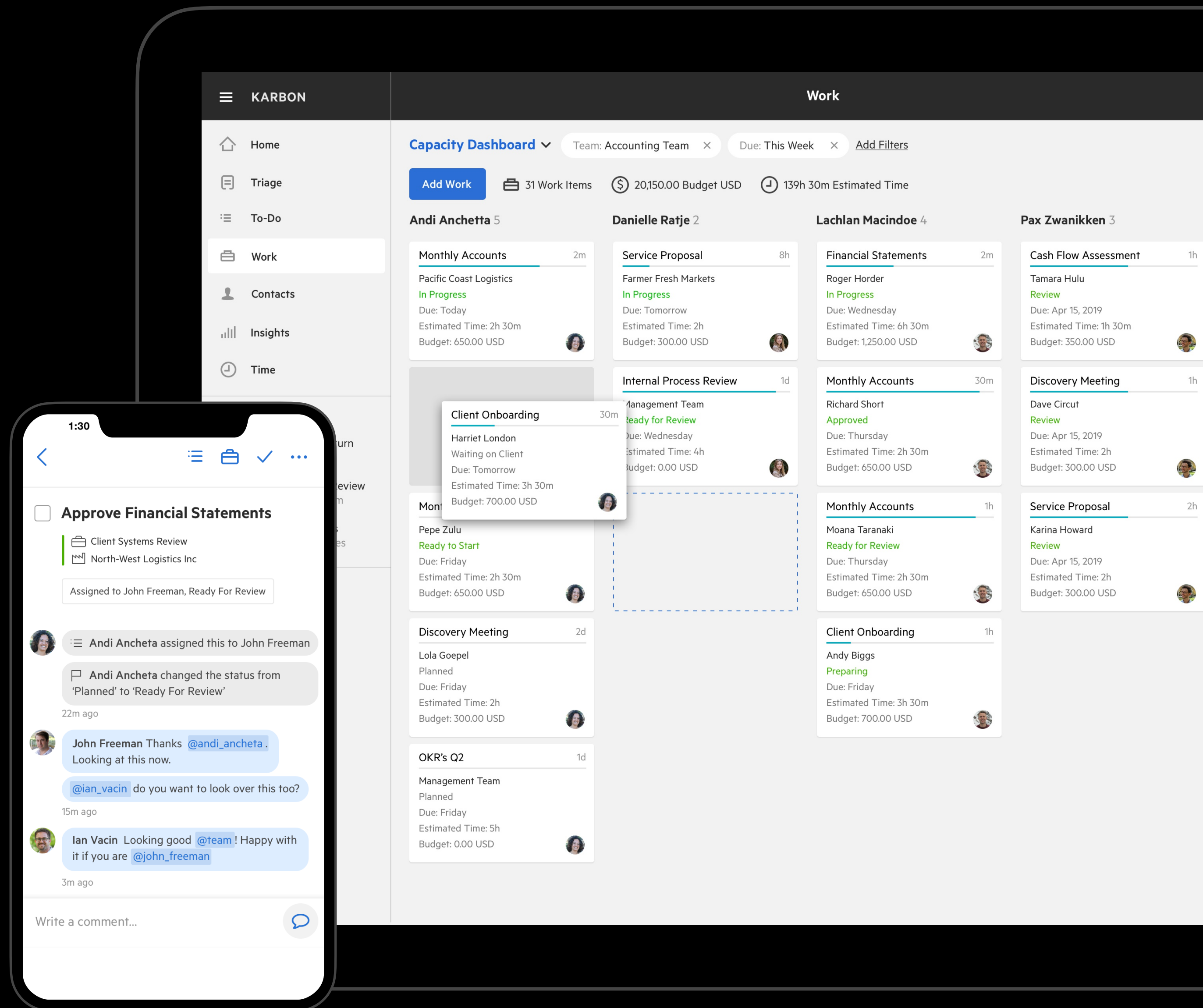
Questions?



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GET STARTED



Thank you

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