



How to stop chasing clients

karbonhq.com



Meet your host



Ian Vacin

Karbon

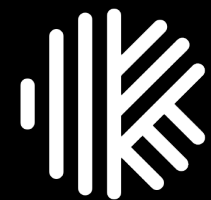
Chief Customer Officer



karbonhq.com

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

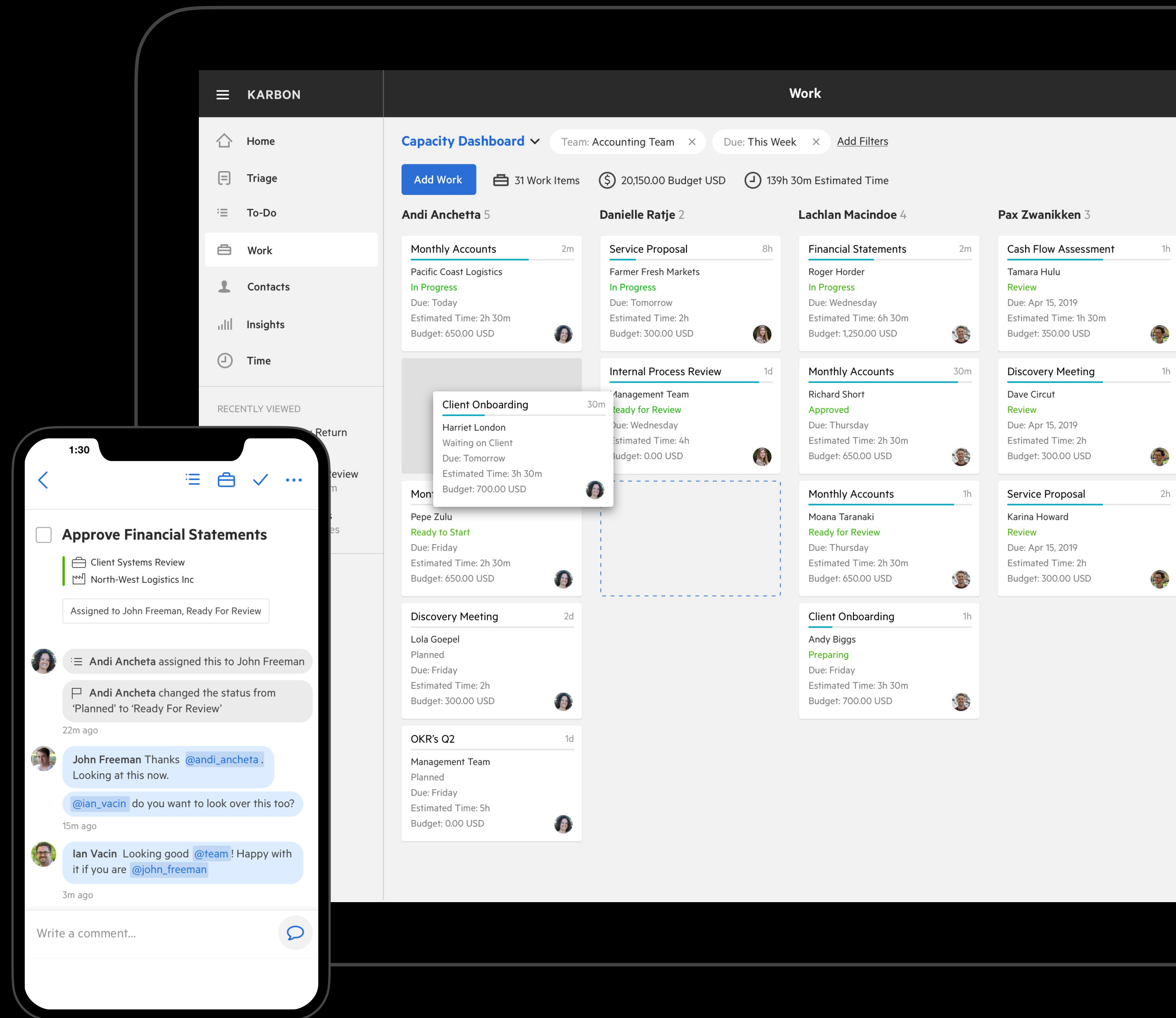




Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED





How Two Roads grew by 60% in 12 months

Learn how at: bit.ly/2Oqc3EZ

“There is something special about Karbon that exceeds just the technology. It’s made us a better company in general. We’re now looking at doing things that enterprise organizations do, like NPS, which has come from our association with Karbon.”

—Adam Slack, Two Roads

“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. Truths of onboarding**
- 2. Info collection**
- 3. Client management**
- 4. Eliminating the chase**



The impact of long client onboarding

1. **Less revenue:** If onboarding, you aren't charging the monthly subscription.
2. **Lost revenue:** The longer it takes to setup, the higher the risk of losing the client.
3. **Resources held-up:** Key resources are tied up and not producing revenue.
4. **Lower client satisfaction:** First impressions matter. Onboarding anchors the clients' perceived satisfaction.



The facts about client collaboration



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.

How long on average does it take to onboard?

- ...

What step is the bottleneck in the process?

- ...

Why?

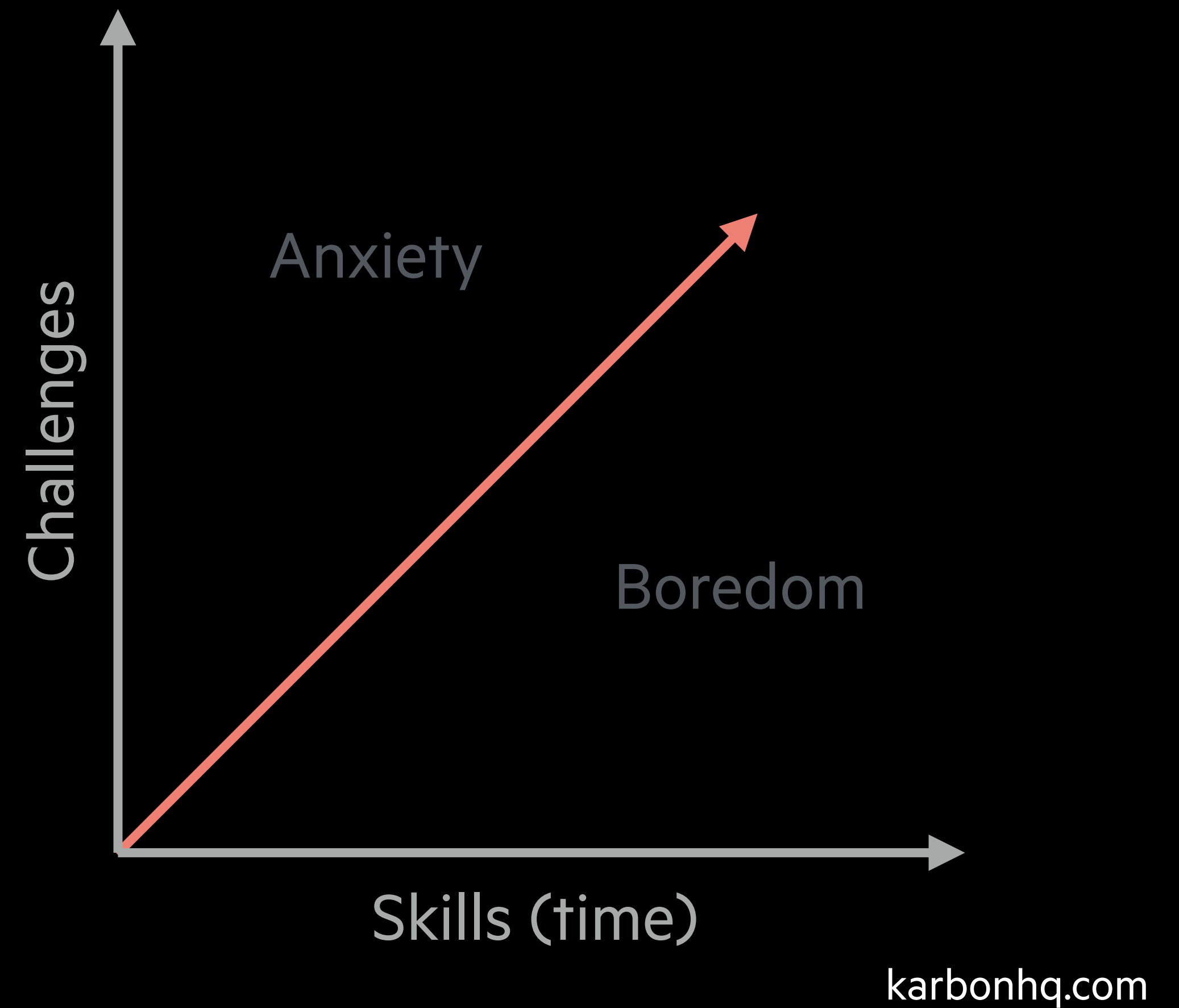
- ...

1. Truths of onboarding
- 2. Info collection**
3. Client management
4. Eliminating the chase



Information collection

- Get info progressively



Information collection

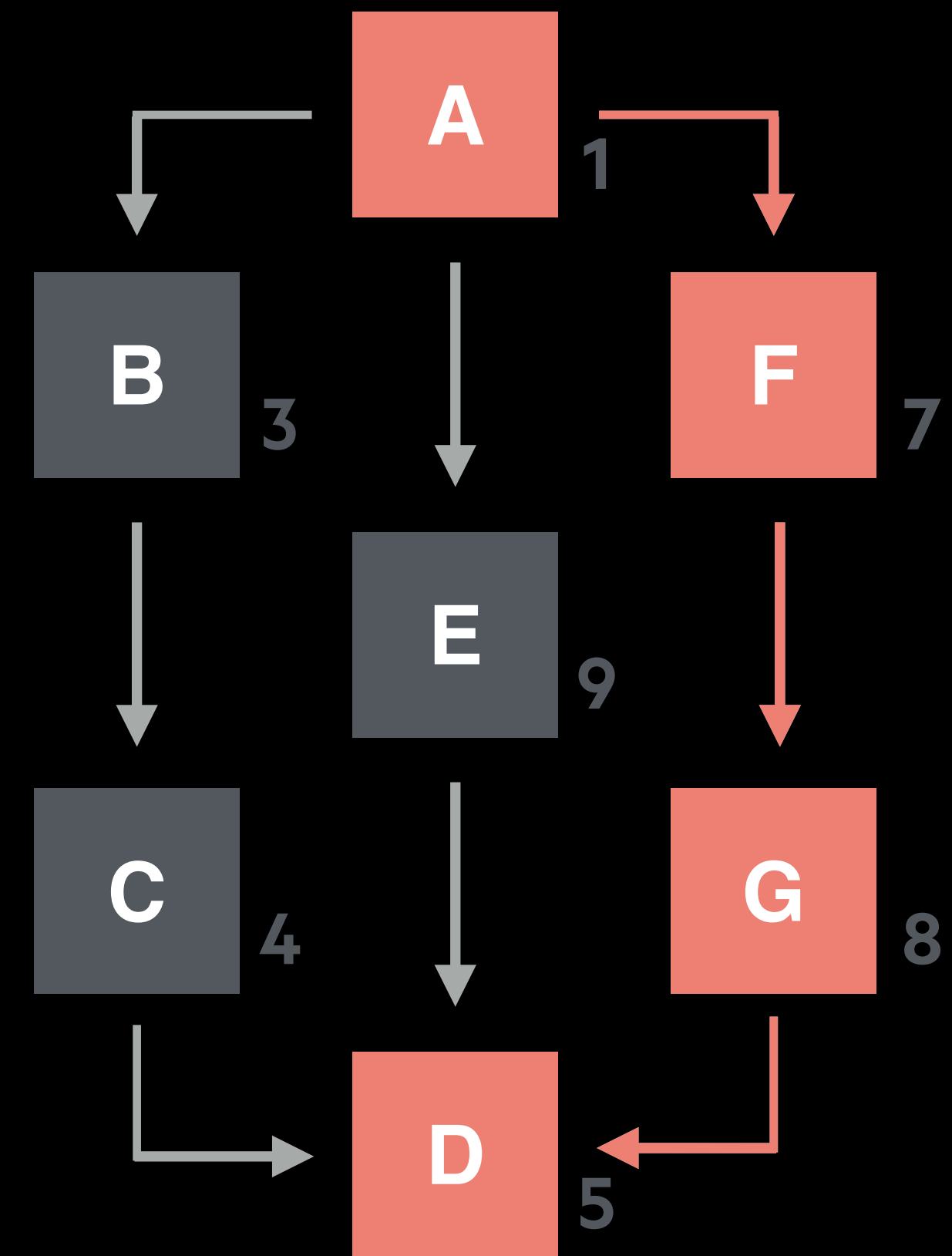
- Get info progressively
- Have clients validate

- Easier to spot something wrong
- Pre-populate whenever possible
- Leverage client social data
- Provide syntax (to give a hint)
- Flag data that's sensitive/suspect



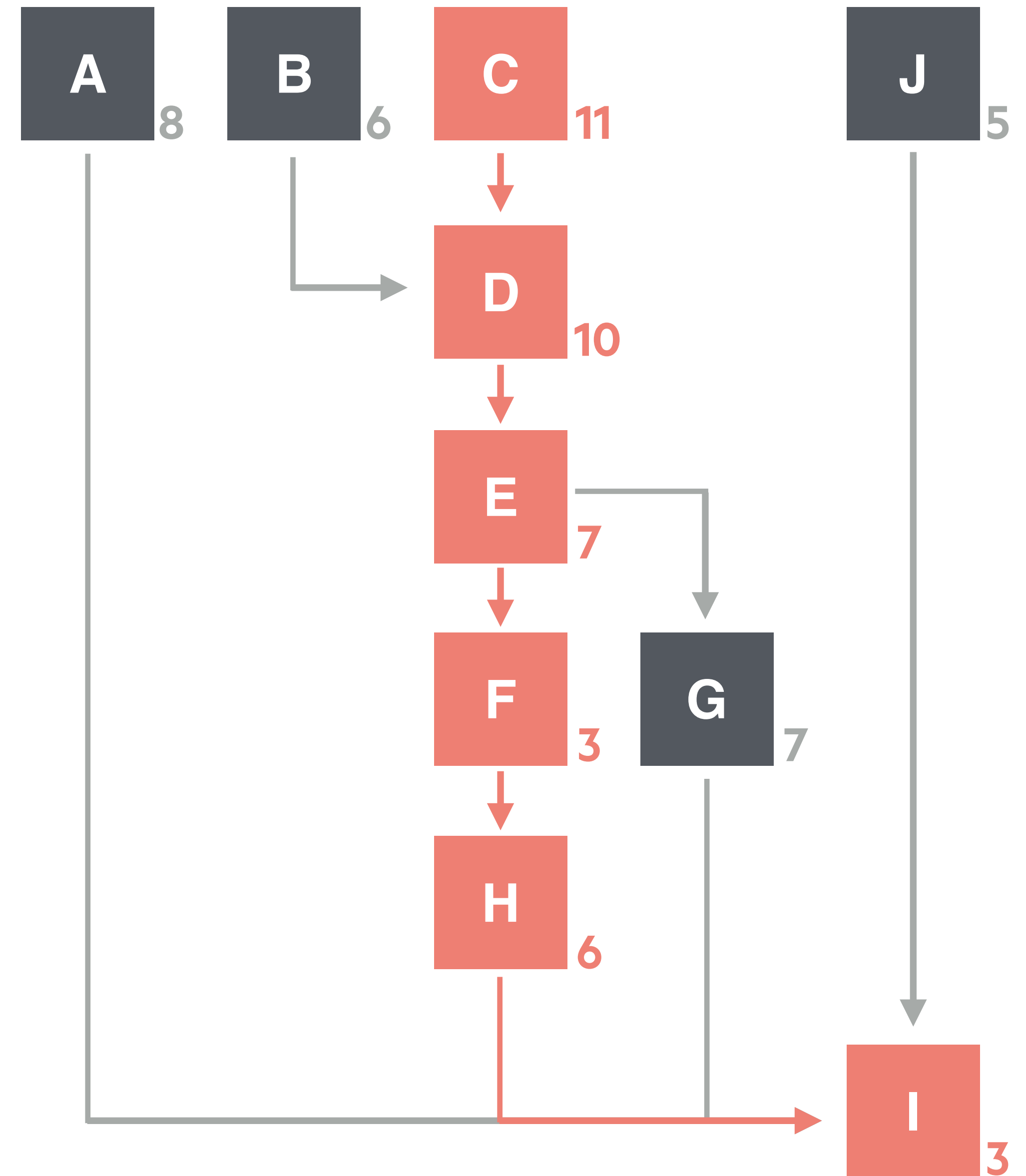
Information collection

- Get info progressively
- Validate (when possible)
- Set a goal and critical path



Example: Onboarding

- A. Weekly communication
- B. Internal setup
- C. New partner systems
- D. Information to gather
- E. Where to start
- F. Going forward
- G. Gathering 1099 information
- H. Review the product
- I. Final presentation
- J. Progress reporting



Source: Two Roads

Information collection

- Get info progressively
- Validate (when possible)
- Set a goal and critical path
- Be clear on deadlines & penalties

**Carrot
vs. stick**



Information collection

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



What info should you ask for first? And last?

- ...

What creative places you could find client data?

- ...

What carrot/sticks with clients have/n't worked?

- ...

1. Truths of onboarding
2. Info collection
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Client management

- Set expectations upfront



1

“This is our processes, what we use, and how we work.”

2

“We’re partners. I am part of your team & you are part of mine.”

3

“These activities are ours, and these activities are yours.”

4

“These things are in scope, and these things are out of scope.”

5

“We want to make sure there aren’t any surprises.”

Client management

- Set expectations upfront
- Be clear on how you will collaborate (SLAs)



Train your client through your SLAs

- Inform from the beginning on how to communicate & expectations.
- Remind your clients as you go and stick to your guidelines.
- Your actions will drive their expectations.

Example #1: Wise Advice

- Emergency: Call cell phone
- Same day: Text
- Everything else: Email
- Forget: One warning, then out.

Example #2: Two Roads

- Mon-Fri: Expect 2-3 hour turnaround
- Sat-Sun: Monday response
- Same turnaround if call or email
- Policy: “Respond before you assign.”



Client management

- Set expectations upfront
- Be clear on how you will collaborate (SLAs)
- One account management contact



Client management

- Set expectations upfront
- Be clear on how you will collaborate (SLAs)
- One account management contact
- Train clients on how to work with you



1

Starts before signing and never stops

2

Understand their learning pattern

3

Have a plan

4

Schedule recurring, dedicated time

5

Always be training

Client management

- Set expectations upfront
- Be clear on how you will collaborate (SLAs)
- Train clients on how to work with you
- Provide your standard operating procedures

Standard Operating Procedures

T Two Roads

Bookkeeper

bettybookkeeper@tworoadsco.com
865-212-0063

Overview

This document outlines the standard operating procedures for Smith Co. and Two Roads working together. Listed below are the responsibilities of the corresponding parties. Each of the responsibilities are contributing to a complete and accurate set of financials each month. These responsibilities may change as efficiency is improved.

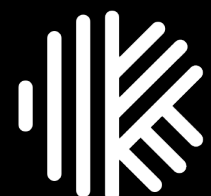
Tasks

Accounts Payable

- Smith Co. will pay all bills on or before the due date with a credit card, debit card, or check
- When the check or payment clears the bank account, Two Roads will record the payment and expense as of the date it clears the bank.

Accounts Receivable

- Smith Co. will invoice all clients out of Go Canvas
- Square will track and collect all payments
- Smith Co. team member takes the deposits to the bank and provides completes the Bank Deposit detail to Two Roads.
- Smith Co. follows up with any outstanding AR balances



Client management

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



What expectations do you set? Others set?

- ...

What are your SLAs with clients?

- ...

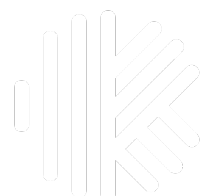
How will you dedicate time or a resource to this?

- ...

Workflow example

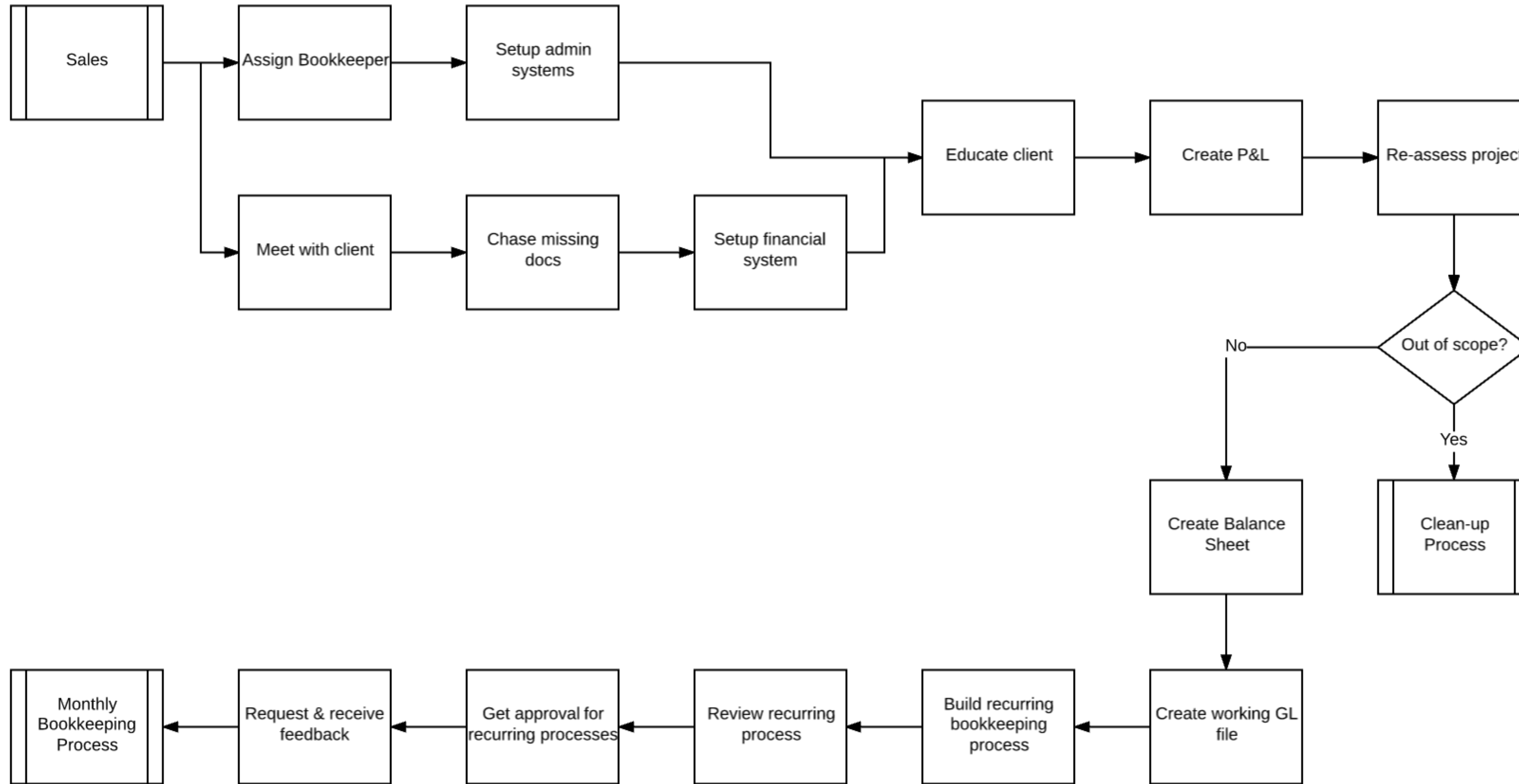
High-level details for onboarding

Objective	Players	Key Moments
<ul style="list-style-type: none">"My books are setup correctly & confident they are taken care of."	<ul style="list-style-type: none">Partners, bookkeeper, systemsBill, Kelly, April & Zach	<ul style="list-style-type: none">"I am ready to get started.""I feel confident in my decision & w/ TR.""I can do this & provide TR what they need.""I know how we are going to work together.""Wow, they are getting my books in order.""While entering D2D items in QBO, I can see TR getting my books in order.""I understand what state my books were in and feel confident on our path forward.""I feel like TR is part of my team."
Goal	Milestones	
<ul style="list-style-type: none">Reduce time to complete by 50%	<ul style="list-style-type: none">Proposal for services signedBookkeeper assigned1st appointment with PartnerUnderlying systems setupKey financials are gatheredPartner educated proceduresPartner collaboration on item	
Metrics		
<ul style="list-style-type: none">Baseline: 30 days (on avg)Target: 14 days (on avg)		
Ownership		
<ul style="list-style-type: none">Driver: Zach; Approval: Adam		



Source: "Client Onboarding" process for Two Roads

Overview of onboarding workflow



What does your onboarding workflow look like?

- ...

What could/would/should/wish to incorporate?

- ...

What will you change in ~30 days to improve?

- ...

1. Truths of onboarding
2. Info collection
3. Client management
4. **Eliminating the chase**



Overview of client tasks

CLIENT TASKS

Payroll requirements – Sending Settings

Add Client Task

☐

Provide details of all new staff hires.

Please provide us with the full name and details of any new staff members for this pay period.

Due 2 days before

☐

Sign and return document



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☐

Sign and return document

Annual Tax 2016 for Reach Foundation

TimelineTasksDetails

Pre-work

☒ Something that we have to do before the job starts

☐ Check client organiser and bank statements

☐ Scan accounts in Xero to look for any issues

▼ Reach Foundation tasks (3) – Not sent to client

☐ Please send us copies of your bank statements

☐ Please fill out and return our 2016 Annual Tax Organiser 2016 248KB

☐ Please reconcile all transactions in Xero up to the end of the financial year

Add

Completed

In Progress

Ready to start

Not sent yet

Not sent yet

Not sent yet

Due 12 Feb

Due 12 Feb

Due 12 Feb

Due 12 Feb

Due 12 Feb

Due 12 Feb

Client task

Client task

Client task

Client task

Client task

Client task

Send tasks to client

A Abigail Silvers

☐ Send tasks now

☒ Schedule tasks to auto send later

Mon 1 Apr, 2017

Auto reminders

☐ Automatically send gentle reminders

Reminder 7 days before task due

Reminder on task due date

Daily reminder when overdue

Preview email

Cancel

Save & Send later

CLIENT TASKS

Payroll requirements – Sending Settings

Add Client Task

☐

Provide details of all new staff hires.

Please provide us with the full name and details of any new staff members for this pay period.

Due 2 days before

☐

Sign and return document

Client Task Email

Email subject

Please complete this checklist - <%work_name> - <%client_name>

Email body

Hi <%preferred_name>,

Please complete the following checklist for us. By clicking below, you can get more information, add comments or questions, and upload files. Once you have completed an item please remember to check it off so we know that it has been done.

Available placeholders: <%preferred_name> <%work_name> <%client_name> <%contact_name> <%reminder_number>

CancelSave

Annual Tax 2016 for Reach Foundation

TimelineTasksDetails

Pre-work

Something that we have to do before the job starts

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☐

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☐

Please reconcile all transactions in Xero up to 31/03/2017

☐

Add

Completed

In Progress

Ready to start

Not sent yet

Not sent yet

Not sent yet

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CancelSave

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▼ Reach Foundation tasks (3) – Not sent to client

☐ Please send us copies of your bank statements

☐ Please fill out and return our 2016 Annual Tax Organiser

☐ Please reconcile all transactions in Xero up to the end of financial year

Add

Completed

In Progress

Ready to start

Not sent yet

Not sent yet

Not sent yet

Send tasks to client

Abigail Silvers

☐ Send tasks now

☒ Schedule tasks to auto send later

Mon 1 Apr, 2017

Auto reminders

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Reminder 7 days before task due

Reminder on task due date

Daily reminder when overdue

Preview emailCancelSave & Send later

Annual TaxSpringsteen Motors

Balanced Books CPA would like you to complete the following checklist. Click on items to see more details, upload files and leave comments. Once you have completed an item please remember to check it off so we know that it has been done. [How this checklist works](#)

Annual Tax 2018 Requirements

☒ Provide copies of bank summary statement for last financial year.

1 comment1 file

☒ Complete and return our Annual Tax Organizer.

3 comments1 file

Tilly Jones OK that's been done too.

☐ Reconcile all transactions up until end of financial year.

2 comments

Lachlan Macindoe OK great, thanks for letting me know

Log out

Overview of client tasks

- Incorporate your clients directly into the workflow with a Client Section & Tasks.
- Each Client Section allows any number of client tasks to be sent at once using a custom email plus optional reminder emails (up to five).
- If the client clicks on the tasks in their email, it brings them to an automatically created client portal where they can collaborate (check off, comment, and download or upload files) on each individual client task.
- Every time a client interacts via the client portal, the sender of the client task (work assignee, client owner or specific colleague) will receive an email notification with the action performed by the client.
- Client Sections can also incorporate Automators to signal when out or completed.



When to use client tasks

- Get meetings scheduled
- Collect onboarding docs
- Provide follow-up notes
- Get clarification on open items
- Collaborate on a work item
- Upload / download sensitive docs
- Email confirmations on completed work



Automating the client chase

Use Sending Settings to automate

Sending Settings

Send To

Dana J Scott

×

From

Work assignee

▼

☒ Send tasks now

☐ Schedule tasks to auto send later

[Edit Email](#)

Cancel

Next

Who & When

Client Task Email

Email subject

Please complete this checklist - <%work_name> - <%client_name>

Email body

Hi <%preferred_name>,

Please complete the following checklist for us. By clicking below, you can get more information, add comments or questions, and upload files. Once you have completed an item please remember to check it off so we know that it has been done.

Available placeholders: <%preferred_name> <%work_name> <%client_name> <%contact_name> <%reminder_number>

Cancel

Save

What

Sending Settings

☒ Automatically send gentle reminders ▼

Reminder 7 days

Reminder on task

Daily reminder v

Gentle reminders ✓

Urgent reminders

Custom reminders

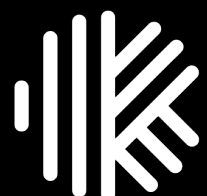
'Gentle' reminders are based on due dates to all client tasks, or use 'Urgent' reminders instead.

Edit Reminder Email

Cancel

Save

How



Client task FAQs

- Who can client tasks be sent from?
- Can they be sent automatically, manually or both? Can I cancel a client task?
- Can you send client tasks to multiple people?
- What types of reminders can be sent?
- How many reminders can be sent?
- What is the construction of the emails sent via client tasks?
- What happens if I send multiple client task groups from a single work item?
- Is the portal secure? How do I reset the PIN?
- Who receives a notification when a client collaborates on a client task?



Tips and tricks with client tasks

Collaborating with clients

- ONLY emails and client tasks provide an interaction and visibility to data displayed within Karbon. When used, the background is pink.
- You or your client can collaborate on a client task via a comment. Anything said in the pink comment area is visible to the client. You cannot make an internal only comment directly on a client task.
- When using a client task, EVERYTHING in the Client Group is displayed to the client. In addition, the current work item name, client group title, and your Karbon instance name are displayed.
- Upload/download of documents is secure (available only via dedicated email invitation, 4-digit PIN, 256-bit encrypted site).



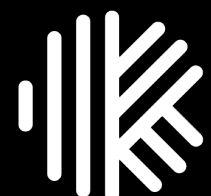
Email placeholder tokens

- **<%work_name>** will update to the name of the work item
- **<%client_name>** will update to the name of the client the tasks are for
- **<%preferred_name>** will update to the preferred name of the client the tasks are for. If the contact has no preferred name specified, the full name will be used instead.
- **<%contact_name>** will update to the name of the contact the tasks are being sent to
- **<%reminder_number>** will update to the reminder number. This is the number of reminders that have been sent to the client for these tasks.

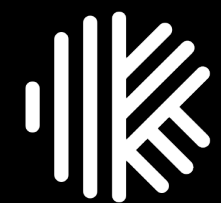


Wrap up

- 1. Truths of onboarding**
- 2. Info collection**
- 3. Client management**
- 4. Eliminating the chase**



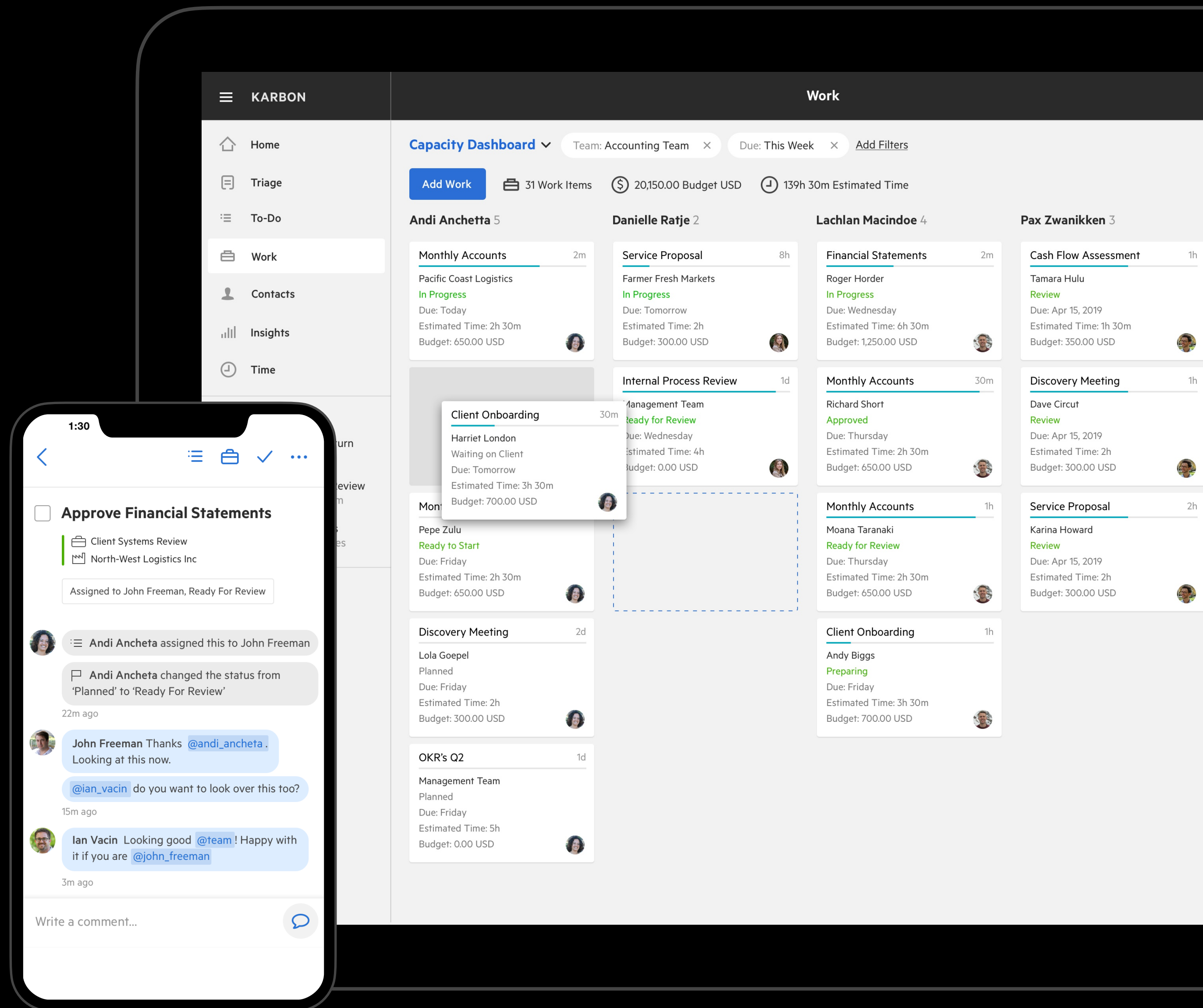
Questions?



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GET STARTED



Thank you

Get started at karbonhq.com

Follow us on twitter [@KarbonHQ](https://twitter.com/KarbonHQ)

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