

Your Checklist for Onboarding Clients to Bill.com

Clients adopting a virtual bill payment solution are fully aware it means significant changes to their current business operations, including new processes and learning a new system.

While intellectually they appreciate the overall intent of the transition, many struggle with getting there. Having a formal onboarding process for moving clients to Bill.com helps minimize the challenges that accompany this change.

Establish a consistent process to help your firm achieve expertise and efficiency in bringing all clients on board with Bill.com. Following the steps outlined here will help you get there quickly!



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Checklist

Step 1: Preparation

Illustrate the benefits of Bill.com.

- ☐ Greater opportunity to make quicker and better decisions with real-time data and integrations with QuickBooks, Xero, NetSuite, and Sage Intacct.
- ☐ Less time spent processing payments.
- ☐ Ability to review and approve payments at any time, from any device.

Sell the value of team service.

- ☐ Implement separation of duties to prevent fraud and ensure proper checks and balances.
- ☐ Enhanced transparency and collaboration ensure nothing falls through the cracks.

Schedule a kickoff meeting.

- ☐ Understanding questions and concerns helps convey your interest in assisting the client's success.
- ☐ Educate the client. Make sure the client has the resources necessary to get through each step.
- ☐ Identify client employees that may need extra attention or hand-holding to get on board and fully trained.
- ☐ Identify early adopters that can encourage any colleagues having a harder time.

Step 2: Build processes to ensure success

Build a bill payment process.

- ☐ Map the current (paper-based) bill pay process to ensure any factors or nuances specific to the client's environment are recognized and considered in the following phases.
- ☐ Establish what role everyone fills and spell it out clearly for both the client and the firm.
- ☐ Educate the client on what to stop doing, such as not integrating systems or not using the appropriate approval workflow.
- ☐ Formalize the process in writing and having the client sign off on the agreed-upon workflow so that all can be held accountable for its execution.
- ☐ Train the client on how to use Bill.com. Show features that make the client's life easier such as the Bill.com mobile app and automatic, audit-ready tracking.
- ☐ Set a date to tweak, approve and begin using the process with the client.
- ☐ Set expectations.

Step 3: Follow up

- ☐ Show the client the results, including real-time information and reporting, to illustrate the value of Bill.com. Wrap this information into "big-picture" consulting that touches upon issues like cash flow.
- ☐ Remind the client to keep using the process. Don't be afraid to challenge the client to stick with the program even if there are some struggles.
- ☐ If the client isn't using the process, ask why. Then, you can work with the client to modify the workflow as necessary.
- ☐ Congratulate the client on using the process. Consider helping the client create a reward system for reaching milestones to further encourage adoption.

Find more onboarding tips by logging in to your **Bill.com** Accountant Console and clicking the Accountant Resource Center link. If you are not a Bill.com customer, please visit **bill.com/for-accountants** to sign up for a free trial.