

# How to Help Your Clients Become More Comfortable with Going Digital



## Tips to Help Your Clients Transition from Paper to Digital

Like most businesses in the twenty-first century, you're actively moving from a paperless environment to a more digital-friendly way of life. Though it's easy for you and your team to make the switch, you're likely going to get pushback from your existing client base, especially from those who aren't very tech-savvy and are used to working with physical copies of their documents.

## Why the Pushback?

Most people can be resistant to change, especially when using technology. Hesitancy can come from a variety of reasons, such as:



### Misinformation

There is still a misconception surrounding the security of technology, and rightfully so due to the increase in cyberattacks in recent years. However, many people don't realize that cybercriminals are only successful when technology providers don't keep security measures at the forefront of their products.



### Fear of Data Loss

Though the concept of "the cloud" has become more popular in the last decade, many people still don't understand its purpose in making it easier to access your documents at any given time. Some people are under the impression that if you get locked out of your account, you'll lose all of your data and never be able to reaccess it. They maybe don't realize that by storing files in the cloud, you are less likely to lose your most important data. The key at this point is not to get locked out (the good news is, there's almost always a way to log back in!)



## Lack of Time

Some people don't see value in spending the time to learn how to use a software solution. They might see it as a waste of time. While it does take time to learn new software, the truth is it takes time to learn anything new, and technology isn't going anywhere anytime soon, so better start learning sooner than later!

These are just some of the top reasons someone could be averse to switching to a digital solution, and it will differ from client to client. Though asking your clients to make the switch seems like a daunting task, it doesn't make it an impossible one. In the long run, it will benefit you by increasing customer growth, reducing churn, and putting time back into everyone's day.

## Top 3 Tips

When the time comes to have your clients go digital, use the following tips to help you increase product adoption:

## Set Goals

Setting goals for you and your staff to increase product adoption is key to getting as many people to make the switch as possible. Set both short-term and long-term S.M.A.R.T. goals!

- S) Specific:** Make your goals specific and narrow for more effective planning.
- M) Measurable:** Define what evidence will prove you're making progress and evaluate when necessary.
- A) Attainable:** Make sure you can reasonably accomplish your goal within a specific time frame.
- R) Relevant:** Your goals should align with your values and long-term objectives.
- T) Time-Based:** Set a realistic, ambitious end-date for task prioritization and motivation.

When it comes to SmartVault, short-term goals can be as simple as having 80% of your clients log in to your client portal at least once within the next 30 days. Long-term goals might look like having 60% of your client base uploading and exchanging documents throughout the busy tax season. Setting goals can help you outline your overall strategy and decide when to modify your milestones if necessary.

## Create messaging and resources to help answer questions

Instead of making the instant switch from a paperless process to a digital one, take the time to outline critical messages to inform your customers before, during, and after you've implemented new software. Start by notifying them about technology changes a month before executing, and then send daily reminders at least three days before the switch. Outline the reasons you are making a change, how this benefits you and them, and what they can expect in the coming weeks. We also recommend creating a FAQ document and continuously updating it with questions your clients have for you. This messaging can help your clients become more self-sufficient and alleviate your time spent answering multiple questions on any given day.

## Offer training courses/videos and create an onboarding plan.

Most technology providers will have resources to share with your clients to help them adjust to a new process. For example, in SmartVault's support center, we outline the Guest User experience and provide a video walkthrough and step-by-step screenshots so that your clients have something to refer to when utilizing SmartVault. You can send this directly to your clients, or you can use it as inspiration to create your own guide and develop an onboarding plan for future clients!

Using new technology can be scary for your clients, but it doesn't have to be! Especially when choosing a solution like SmartVault, that's easy to use and can make your life exponentially easier. To see how SmartVault streamlines the lives of you and your clients, schedule a 15-minute demo with one of our document management experts today!





Built with bank-level security, SmartVault offers a cloud-based document management system and client portal designed to help you reduce costs, raise productivity and employee happiness, stay in compliance, and deliver higher levels of service.

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