SmartVault

6 Steps for Better Client Onboarding

The average accounting firm takes 6-8 weeks to onboard a client fully. Taking this long suggests your firm is slow and disorganized, two things that don't look good to a newly minted client. And it makes things harder on you and your team.

This infographic outlines key steps and benefits of providing new clients with a seamless experience that enhances security, increases retention, and empowers collaboration among your clients and staff alike.

Key Advantages of Optimized Onboarding

1. Map Onboarding Workflows

Review, improve, and document your current onboarding processes.

Enhances Security
- Automates secure workflows
- Removes risky manual processes like email
- Keeps sensitive data protected
- Helps maintain compliance

2. Communicate Workflows

Share documented workflows with team members and clients so everyone understands the streamlined process.

Increases Client Retention
- Reduces client drop-off
- Increases engagement with self-serve portals
- Provides consistent, seamless experience
- Builds client trust and confidence

3. Send Client Questionnaire

Have new clients fill out a questionnaire to collect necessary information upfront.

Smoother Collaboration
- Centralizes documents and tasks
- Clarifies roles and workflows
- Facilitates communication
- Enables real-time coordination

4. Initial Video Call

Schedule a video call to build rapport, align on goals, and introduce your firm's tech stack.

5. Set Up Tech Stack

Provide access to your DMS, client portal, and key software to integrate them into your systems.

Improves Employee Satisfaction
- Reduces frustration with manual tasks
- Increases efficiency and productivity
- Allows focus on value-added work
- Boosts morale through process improvements

6. Continually Optimize

Regularly collect client and staff feedback to identify areas for improvement.

Onboard Clients with Ease

Download our free guide, *A Guide to a Better Experience for Onboarding New Tax & Accounting Clients*, for more in-depth advice from the pros.

Ready to get started? SmartVault makes client onboarding easy. Centralize documents, enable client self-service, and systematize workflows.

Get the Guide

See a demo today