

An Intuit checklist

CLIENT ONBOARDING CHECKLIST

Attracting new clients will help your accounting firm generate healthy revenue and expand its operations.



An efficient client onboarding process is critical when you're in growth mode. It sets the tone for the relationship, ensures a smooth transition from the client's former supplier of accounting services and presents your firm in a professional light.

Here are the things you should do to get things off to a great start.

- ✓ Create a welcome package.**

An introduction to your organisation and staff, it should provide new clients with an understanding of your firm's values and the full range of services you offer.


- ✓ Provide a scope of work document.**

A formal outline of the way you'll work together, this should contain details about the specific services your firm will deliver to the client, your fee structure, the expected duration of the relationship and the responsibilities of both parties.


- ✓ Develop a document checklist.**

Advising new clients at the outset of any paperwork you need them to supply - think financial statements, tax returns, business plans and legal documents - will save both parties time down the track.


- ✓ Share your payment policy.**

Being upfront about how you expect to be paid will minimise misunderstandings and billing issues. Your payment policy should detail your payment terms and accepted payment methods, the frequency with which you'll invoice customers and whether advance payments are required.


- ✓ Provide sign-up details for your digital portal.**

In today's times, clients want to be able to engage with suppliers flexibly and share important information online. It will be easy for yours to do so if you've invested in a user friendly, 'self serve' facility that allows them to lodge and access documents, reports and messages securely.


- ✓ Schedule an introduction meeting.**

Professional services is all about relationships. Catching up with key contacts, in person, over the phone or via an online platform such as Zoom or Teams, sends a strong signal to new clients that their custom is valued. It's an opportunity for you to build rapport, learn more about their business and address any queries or concerns they may have.


- ✓ Establish expectations around deliverables.**

Providing clients with a clear idea of how quickly their tasks and projects will be completed, and determining how often they'd like to receive reports and updates, will ensure everyone is on the same page.


- ✓ Follow up in writing.**

Your new clients may use your initial meeting to ask questions you're unable to answer on the spot. Taking notes and following up with your responses, along with a summary of what was discussed in the meeting, will show them that they can expect to receive a responsive, professional service from you and your team.



Changing accounting firms can be a big step.



Communicating openly and transparently and providing new clients with all the information they need upfront will help allay any concerns they may have about bringing their business to your firm. That makes it more likely they'll stick with you long term and recommend your firm to their friends, family and business associates too.