

—Pixie—

The Accountant's Onboarding Workflow Guide + Template (UK)

Learn a step-by-step workflow for onboarding new
accounting clients in less time (without missing a step)

About this guide

You've done the hard work winning the client...

Now you need to make sure that you set them, and yourself, up for success to get the most out of your working relationship.

This all starts with a standardised, documented, step-by-step onboarding process.

In this guide, you'll find an onboarding process that takes you from engagement letters to regular monthly services, that is easy to customise and streamlined to fit your practice. We've even included a tech-map to help you automate your onboarding process further!

Here's what's included:

- [Flowchart] The Onboarding Process
- [Tech Map] The Automated Onboarding Process
- [Pixie Template] The Accountant's Onboarding Workflow Process
- [Case Study] How we streamlined our onboarding and scaled up with Pixie
- [About] How Pixie can help you to take control of your onboarding workflow

Ready to get started?

About Pixie

Hi there! I'm Celso, Founder & CEO here at Pixie.

Thanks for downloading a copy of this onboarding workflow guide + template. I hope you find it helpful!

If we haven't met, Pixie is a practice management and workflow app built for small accounting & bookkeeping firms. In just a few clicks, it helps you to reduce overwhelm, get organised and take control of your clients, workflow, and team in one simple and easy-to-use app.

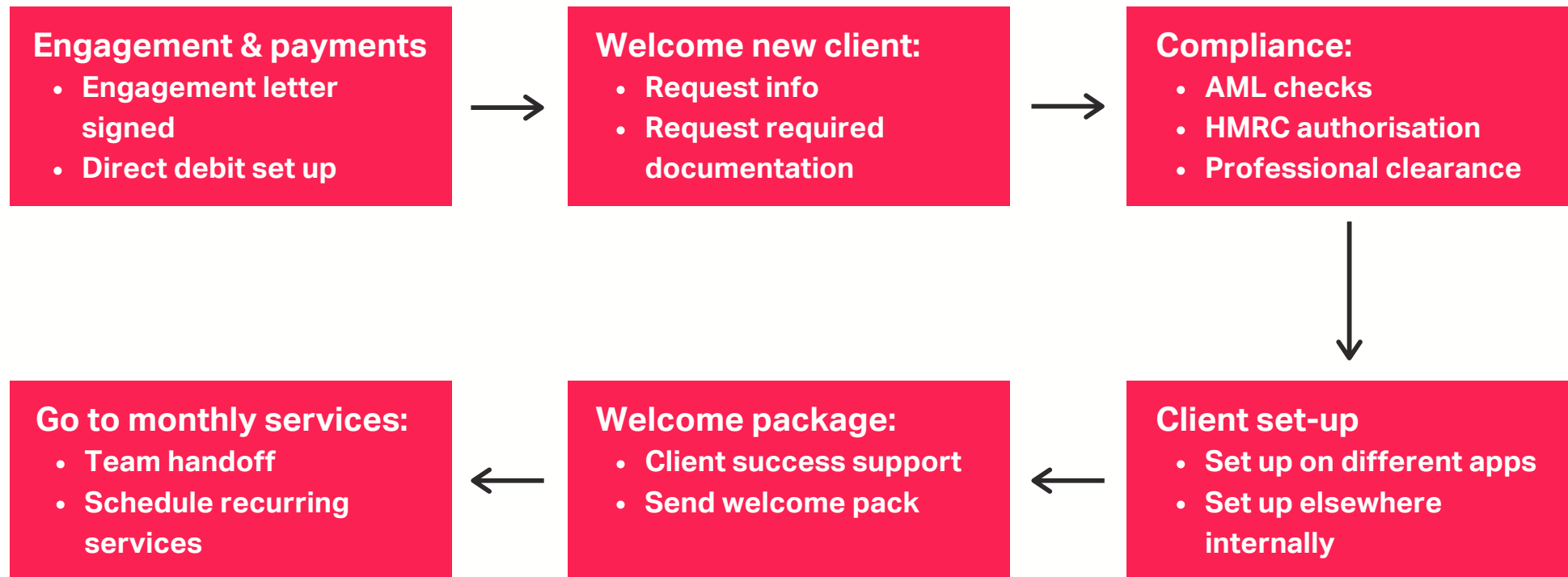
If you find yourself struggling to keep track of your deadlines, spending too much time chasing clients for missing information, and needing better workflows and processes to help you scale your firm, then Pixie can help.

This onboarding workflow template will give you a simple, flexible, and repeatable process for you and your team to follow so that nothing falls through the cracks. You can use some of the automation in Pixie (and our integrations with other apps) to take it further and save even more time!

If you have any questions, feel free to reach out to us at hello@usepixie.com.



[Flowchart overview] The Onboarding Process

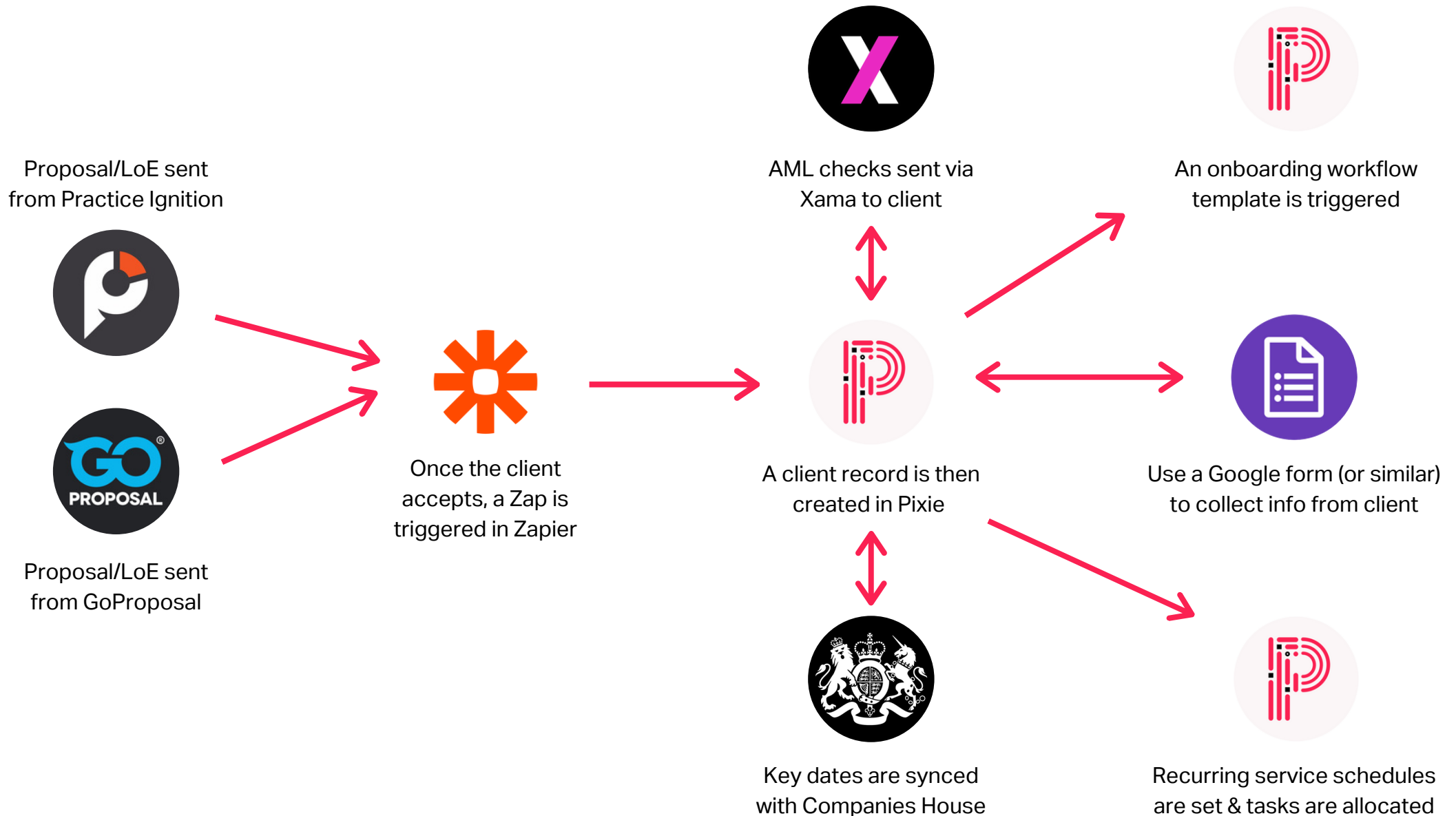


Looking at the workflow from the top-down view helps us see all the core phases of the onboarding process. For each of the phases, you can look to streamline and optimise them. For example, you might choose to use an

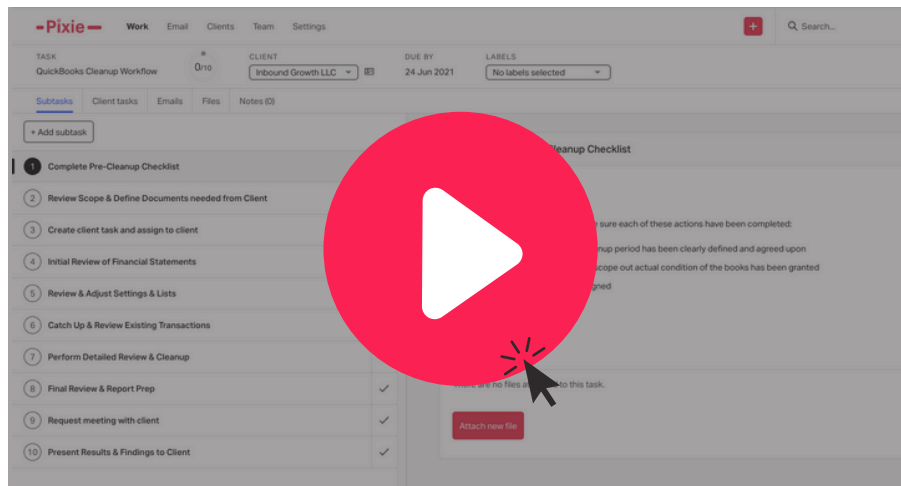
app like GoProposal or Practice Ignition to send your engagement letters vs sending them manually. Or you might choose to use something like Pixie for requesting information and sending reminders to clients. [Let's take a look at this from a tech-map perspective...](#)

[Tech Map] The Automated Onboarding Process

The following tech map gives you an idea of how to build an end-to-end automated onboarding process using Pixie and other apps.



[Template] The Accountant's Onboarding Workflow



Preview the Onboarding Workflow Template in Pixie [here](#).

Want to start using this template today?

All you need to do is:

1. [Start a 30-day free trial here](#) (no credit card required)
2. Click the button below to download your workflow template
3. Go to Settings > Task templates and import your template
4. Enjoy!

**Download your onboarding
workflow template**

The Accountant's Onboarding Workflow Template has been built in Pixie.

Why? Because that's the best way to see exactly how a live workflow can be used, including using automated email templates and being able to assign tasks for your clients to complete.

Having a workflow template that you can use again and again, as well as easily customised for specific project needs AND stay on track with all the moving parts, is a godsend!

Here's everything that's included:

- Email templates ready to send to your clients requesting information
- A checklist of items to assign to your client for them to securely upload
- Email templates for professional clearance and requesting HMRC authorisation codes from your client
- A step by step workflow process for you and your team to follow so that nothing gets missed

You can easily customise the template, checklists, and email language to fit your own practice and your clients' needs. It's intuitive so that you can make adjustments quickly.

[Case Study] How we streamlined our onboarding and scaled-up with Pixie

For Munro & Partners, a team of 5 based in Farnham, Surrey, they spent a lot of time and mental energy onboarding new clients into their firm. From sending proposals and engagement letters manually, to the partners being responsible for completing all onboarding tasks (and inevitably missing things on occasion), getting new clients set up was challenging.

"We used to get down the line and realise we were missing information when we were due to start jobs. With things being missed, it can feel like you're letting new clients down before you've had a chance to get started."

All of this changed when they started using Pixie to manage the onboarding of their new clients.

"We were looking for a way to build more automation into our systems and processes to scale up the business without becoming too heavy on staffing. Pixie has helped us to automate several things, including the onboarding of new clients."

By integrating Pixie with Practice Ignition (via Zapier), they can now send proposals at the click of a button and automatically trigger the creation of clients and jobs in Pixie.

"Once the proposal is accepted in Practice Ignition, the onboarding jobs are created automatically in Pixie, and the team can immediately get on with it. They know exactly what to do. Things like authorisations and requesting codes from HMRC, we're getting all of this done well ahead of time."

Previously, this onboarding process might take anywhere from a few days to a few weeks. Now, Munro & Partners can get things done within a day or two, allowing them to scale up their firm whilst being confident that their new clients will be onboarded correctly and on time.

About

David Munro is a Partner at Munro & Partners, a small accounting firm based in Surrey, UK.

They work with clients in a variety of sectors and specialise in helping them to save money and time so they can smile more and stress less.

"I am passionate about helping SMEs succeed. Success in business is dependent on strategic decision making using accurate and up-to-date information."



David Munro
Munro & Partners

About Pixie

Pixie is a practice management and workflow app built for small accounting & bookkeeping firms. In just a few clicks, Pixie helps you to take control of your clients, deadlines, emails, workflow, and team members, all within the same simple-to-use app.

Do you find yourself struggling with any or all of the following?

- Getting work done efficiently and hitting deadlines on time
- Keeping track of what you and your team are working on for different clients
- Using multiple apps to manage work, emails, files (which wastes a ton of time!)
- Emails and other client communications falling through the cracks and getting missed
- A feeling of anxiety when you finish work, wondering, 'what have I forgotten?'
- Constantly chasing clients for missing information.

Pixie can help you save at least 5 hours per week, take control of your work, and get organised.

In one simple, flexible, and easy-to-use app, you can manage your:

- Clients: with our built-in CRM and customisable client fields
- Emails: make sure nothing falls through the cracks with our 2-way email integration
- Tasks: set up recurring tasks & never miss a deadline again
- Workflows: build simple workflow templates to improve consistency & efficiency
- Team: easily set your teams' to-do's and keep track of what's in progress

Start your 30-day free trial below and get your first tasks and templates set up in minutes.

Start your 30-day free trial



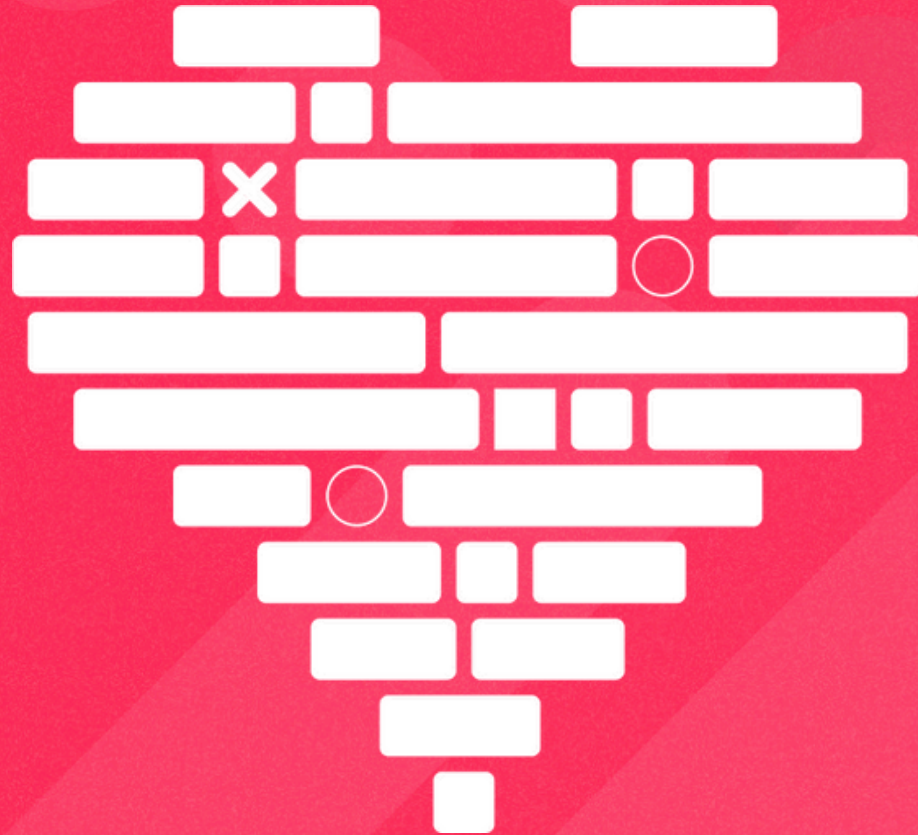
Pricing

Pixie costs the same no matter how many people are in your team or how many clients you have. No surprises. It's one flat fee for your entire firm.

Here's everything that you get:

- Flexible drag-and-drop workflow templates
- Ready-made workflow template library
- Automated email reminders
- Email management & integration
- Recurring tasks and deadline tracking
- Client tasks to assign checklists and to-do's to your clients
- CRM with customisable fields to manage all of your clients
- Built-in document portal and unlimited storage
- Team management and work reporting
- Thousands of integrations via Zapier

Starting at £99 per month
(Unlimited Users)



Start your 30-day free trial

www.usepixie.com