Pixie

The Bookkeeper's Onboarding Workflow Guide + Template (USA)

Learn a step-by-step workflow for onboarding new bookkeeping clients to save time and reduce frustration.

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 standardized, documented, step-by-step onboarding process.

In this guide, you'll find an onboarding process that takes you from engagement letter to regular monthly bookkeeping services, that is easy to customize and streamline to fit your practice. We even give you hints to avoid major headaches and copy-and-paste messages you can use to streamline your process immediately!

Here's what's included:

- [Flowchart] The Onboarding Process
- [Pixie template] The Bookkeeper's Onboarding Workflow process complete with checklists and emails
- [Onboarding tips] Do's and dont's of streamlined onboarding
- [Case study] How we streamlined our onboarding and scaled-up with Pixie

Ready to get started?

About the author

Hi there! I'm Gabrielle Fontaine.

For the last 30+ years, I've done everything from in-the-trenches bookkeeping, to taxes, business & marketing consulting / coaching, and everything in between.

Today, I still run a small bookkeeping practice and work with other small bookkeeping & accounting firms to identify and blast through the operational and growth roadblocks that are preventing you from reaching your next level of success.

When it comes to onboarding new clients, there are lots of moving parts. In truth it's more like a project then a simple workflow, but by having a systematic workflow template in place, it allows you to get all the pieces lined up more quickly and build a happy, loyal new client in the process.

While this guide will give you the basics to getting your onboarding process in place, if you'd like a more in-depth training, you may want to dig deeper with the New Client Onboarding program I taught with Bookkeepers.com that's available HERE.

[Flowchart overview] The Onboarding Process

Engagement & retainer:
- Engagement letter signed
- Retainer received

Welcome new client:
- Confirm choice
- Initial information request

Internal set-up:
- Tech stack
- Schedule
- Assignments

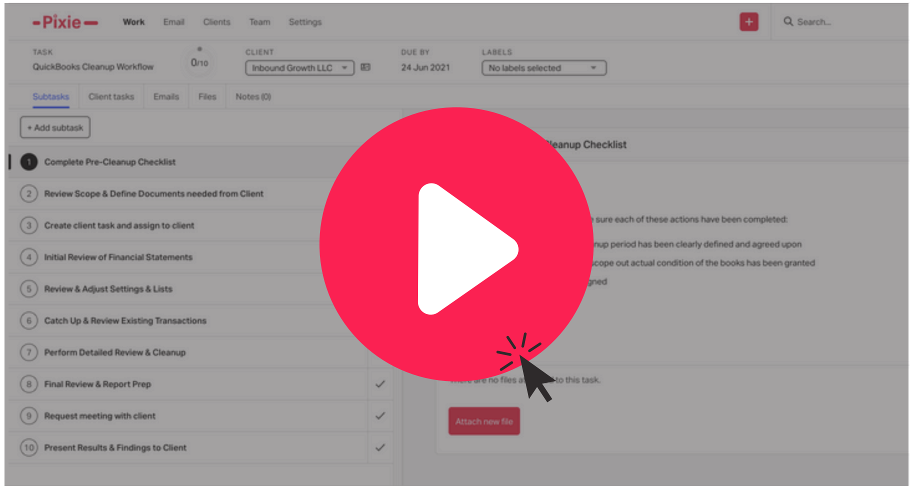
First client meeting:
- Online setup
- Resolve questions
- Next steps

Welcome package:
- Client success support
- Stellar client experience

Go to monthly services:
- Onboarding final check
- Team handoff

Looking at the workflow from the top-down view helps us see all the core phases of the onboarding process. For each main step in the process, consider how you can streamline and even automate specific tasks. For example, can you send a secure electronic engagement letter for signature and retainer payment info? Maybe an app like Pixie that lets you assign client tasks and automatically sends reminders to save you time and frustration is a good fit. Customizing your workflow is where the magic happens! Now let's take a look at the specifics of the workflow...

[Template] The Bookkeeper'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 Bookkeeper'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 adding email templates and even assigning clients' tasks to get the info you need more easily.

Having a workflow template that you can use again and again, as well as easily customized for specific project needs AND stay on track with all the moving parts is exactly what you need to grow your practice and save your sanity in the process.

- You can easily customize the template, checklists, and email language to fit your own practice and the needs of your clients. It’s intuitive so you can make adjustments quickly, even “on the fly” as needed
- This is unified practice management, so all the email communication between you, your team and the client are centralized. Finally, everyone’s on the same page and no steps get missed in the process
- When requesting information from clients, you also don’t have to worry about them sending sensitive content via email, since there’s a built-in secure document portal too.
- You can even assign clients tasks to complete, and easily see what they’ve completed and what they still owe you at a glance. There are also automated reminders to cut way back on the tedious nagging that some clients need!

Streamlined Onboarding Do's and Don'ts

Do's

- Package the services you offer so new client onboarding can be standardized for better efficiency
- Use a team approach with clear accountability so all details are addressed and completed
- Automate standard steps wherever possible (such as reminders for client-assigned tasks)
- Make your onboarding process as easy and enjoyable (even fun!) as possible for your team and client

Dont's

- Begin the onboarding process if there is no signed engagement letter or retainer paid (no exceptions!)
- Assume the client knows what to do next – they need your reminders, guidance and leadership!
- Miss the opportunity to humanize the process and uncover additional services the client may need through empathetic interest

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

For Munro & Partners, a team of 5 based in Surrey, UK, they used to spend a lot of time and mental energy onboarding new clients into their firm. From manually requesting information from clients, to the partners being responsible for completing all onboarding tasks (and inevitably missing things on occasion), getting new clients set up was a challenge.

“We used to get down the line and realize 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 firm without becoming too heavy on staffing. Pixie has helped us to automate several things, including the onboarding of new clients.”

By using Pixie to manage the onboarding of their new clients, they have managed to automate information requests and now have a workflow process the team can follow so that nothing gets missed.

“Once the engagement letters are signed, we set up the onboarding job in Pixie, and the team can immediately get on with it. They know exactly what to do. We’re getting everything done well ahead of time.”

Previously, this 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 specialize 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 organized.

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

- Clients: with our built-in CRM and customizable 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

Capterra 5

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 customizable 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 $129 per month

(Unlimited Users!)

Start your 30-day free trial

www.usepixie.com