



Automate your client onboarding

Heather Satterley



A photograph of two young women with blonde hair, seen from the chest up, engaged in conversation outdoors at night. The woman on the left is in profile, looking towards the right, wearing a dark jacket with a light-colored fur collar. The woman on the right is seen from the back, looking towards the left. The background is dark and out of focus, showing some green foliage. The text "Take a minute to connect with your neighbor" is overlaid in white on the right side of the image.

Take a minute
to connect with
your neighbor

#QBConnect | WiFi: QBConnect

CPE Process

In order to receive CPE credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **2 hours of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

About today's speakers



Heather D Satterley
Satterley Training and Consulting

Member - Intuit Trainer/Writer Network

Founder:

Satterley Training & Consulting

The QB 'Appy Hour with Liz & Heather

Backoffice Ally

BS Accounting / MS Innovation

Enrolled Agent

Certified Zapier Expert



What if this was possible?



It is.

Agenda

Let's start with a plan

Automate your processes with Zapier

What do you want to focus on?

Scheduling

Billing and payments

Client communications

Document management

Proposals and engagement letters

Next steps

Process facilitators



Jan Huago
Jan Huago &
Associates



Nayo Carter-Gray
1st Step Accounting,
LLC



Juliet Aurora
AIS Solutions



Neal Coogler
All About Business
Services




Let's start with a plan.

Step 1: Map your current process

Use the Workflow Process Worksheet provided to document tasks

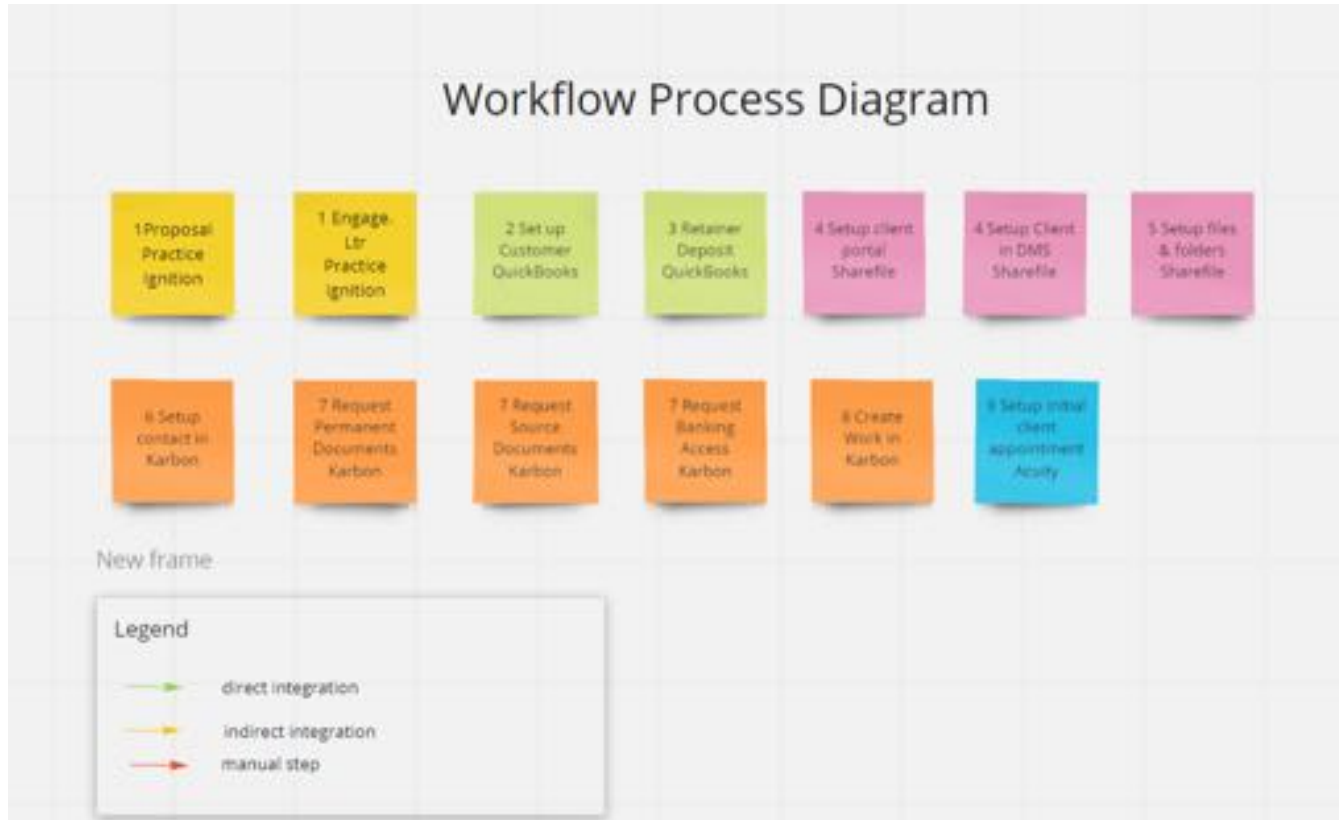
- Each task in your process
- Step # in the process – if two tasks happen simultaneously use the same step #
- App(s) used for each task, or enter manual if you are not using an app

<div><div>Satterley Training & Consulting <small>Smart Training in Smart Technology</small></div><div>Client On-boarding Automation Worksheet</div></div>							
Task	Step # in Process	App used (or manual process)	Integrations (does this app integrate with another step in the process)	Integration rating	On Explorer	On other platform (Microsoft Flow, Integromat, etc.)	Notes
Proposal							
Contract							
Engagement Letter							
Retainer / Deposit							
Client portal							
Set up client in billing system							
Set up client in workflow system							
Set up initial client appointment							
Request banking access / passwords							
Set up client in document management system							
Set up files / folders							
Request permanent file documents							
Request source documents							

[illegible]

Map your current process

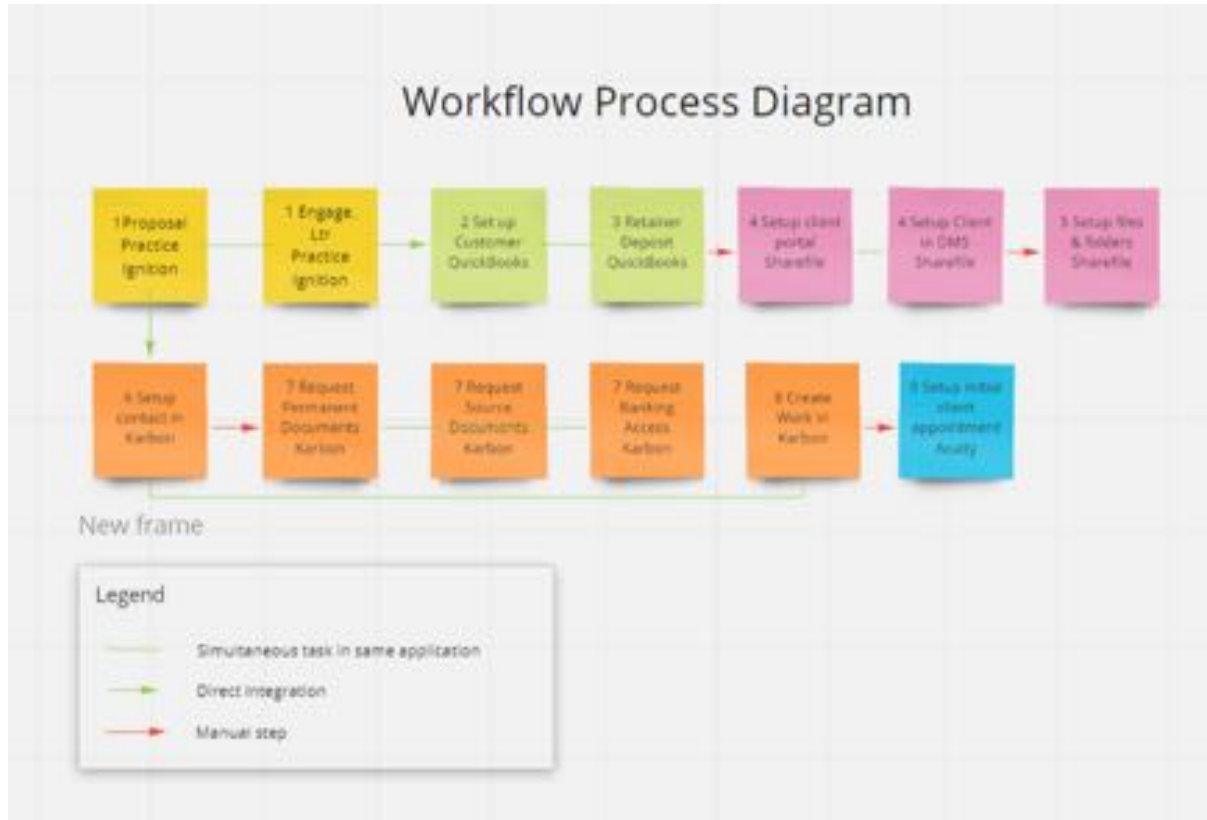
Use the Workflow Process Diagram, sticky notes, and highlighter provided to map out what happens in each step of your on-boarding process



- Use the Process Mapping Worksheet as your guide
- Choose a highlighter color for each app used in your process
- Use the sticky notes to create your tasks
- Place them in order on the Workflow Process Diagram

Identify integrations

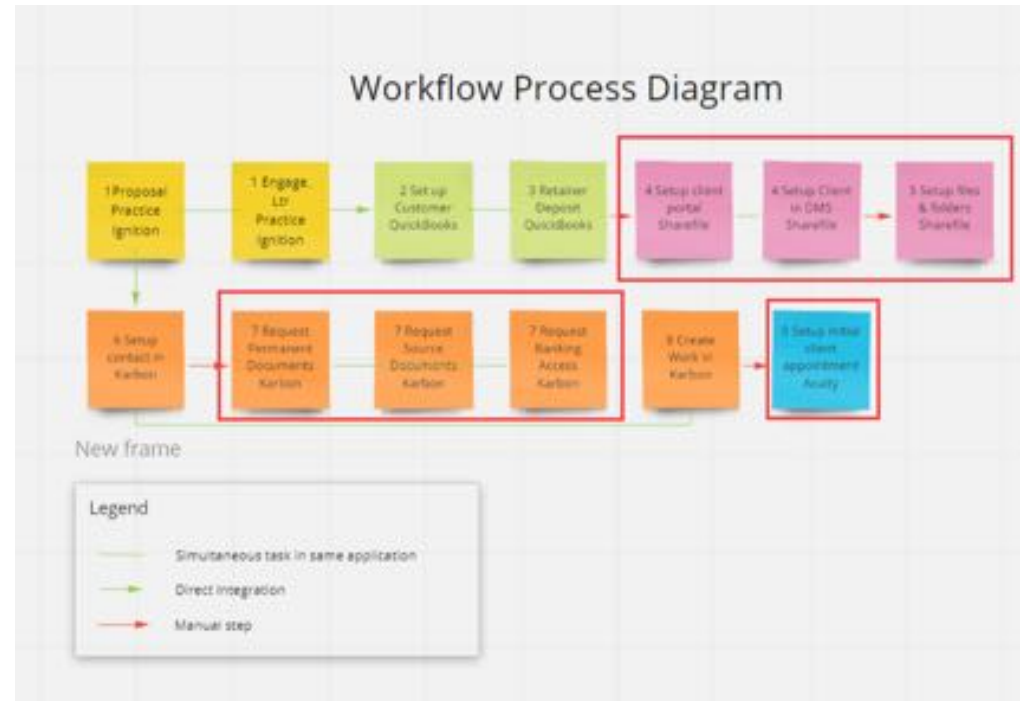
Use the Workflow Process Worksheet provided




- Which apps have a native integration?
- Which steps are manual entry?
- Notate any limitations in the native integration

Identify your non-value add steps

Use the highlighters to highlight areas that are manual and costing you time and money



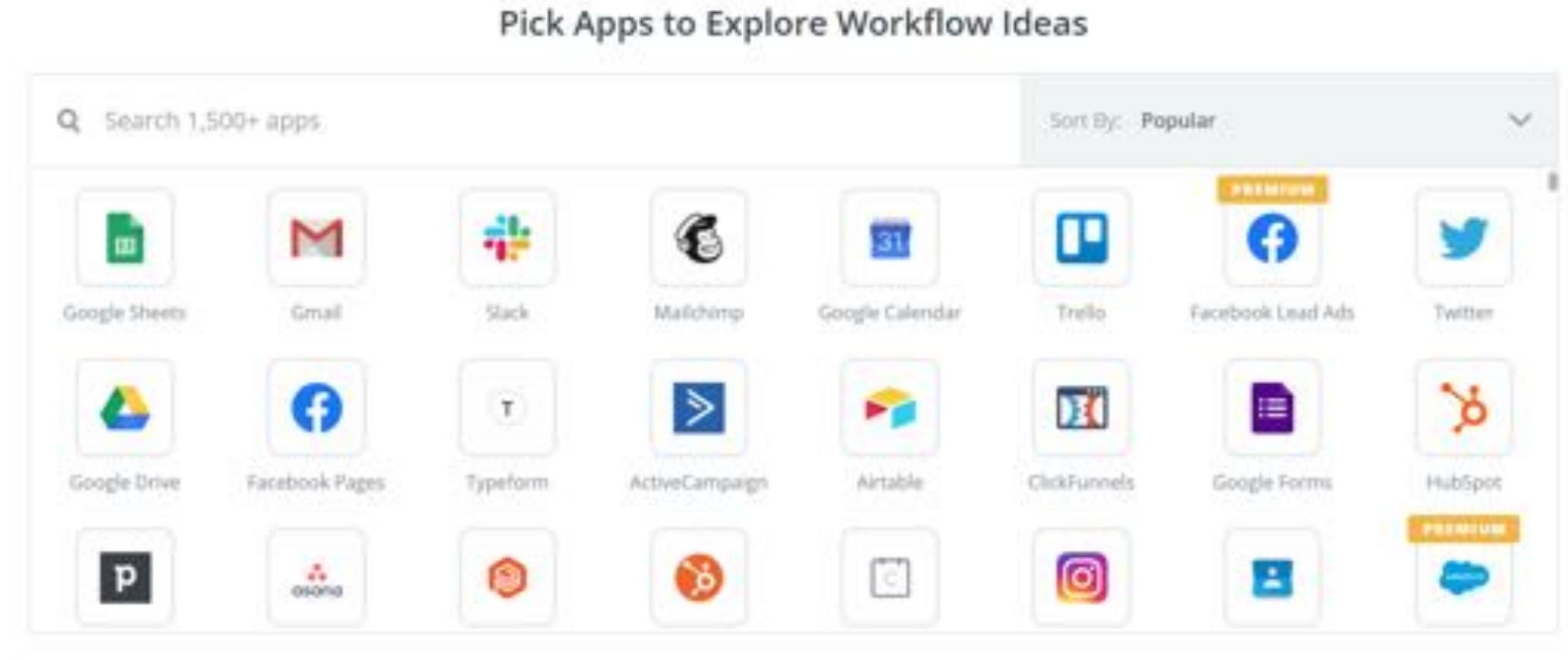
A non-value add step does not promote revenue or add value to your business. Ex: Creating an appointment in Acuity



Automate your workflow with Zapier

What is Zapier?



Zapier is a no-code integration tool that connects over 1,500 apps



Zapier can fill in the gaps in your workflow

Identify if your apps are on the Zapier platform. What are the triggers and actions available?

Practice Ignition + Citrix ShareFile Integrations



In a matter of minutes and without a single line of code, Zapier allows you to connect Practice Ignition and Citrix ShareFile, with as many as 17 possible integrations. Are you ready to find your productivity superpowers?

[Connect Practice Ignition + Citrix ShareFile](#)

What is Practice Ignition?

Practice Ignition is everything you need to create winning proposals, get paid and manage your growing client base.

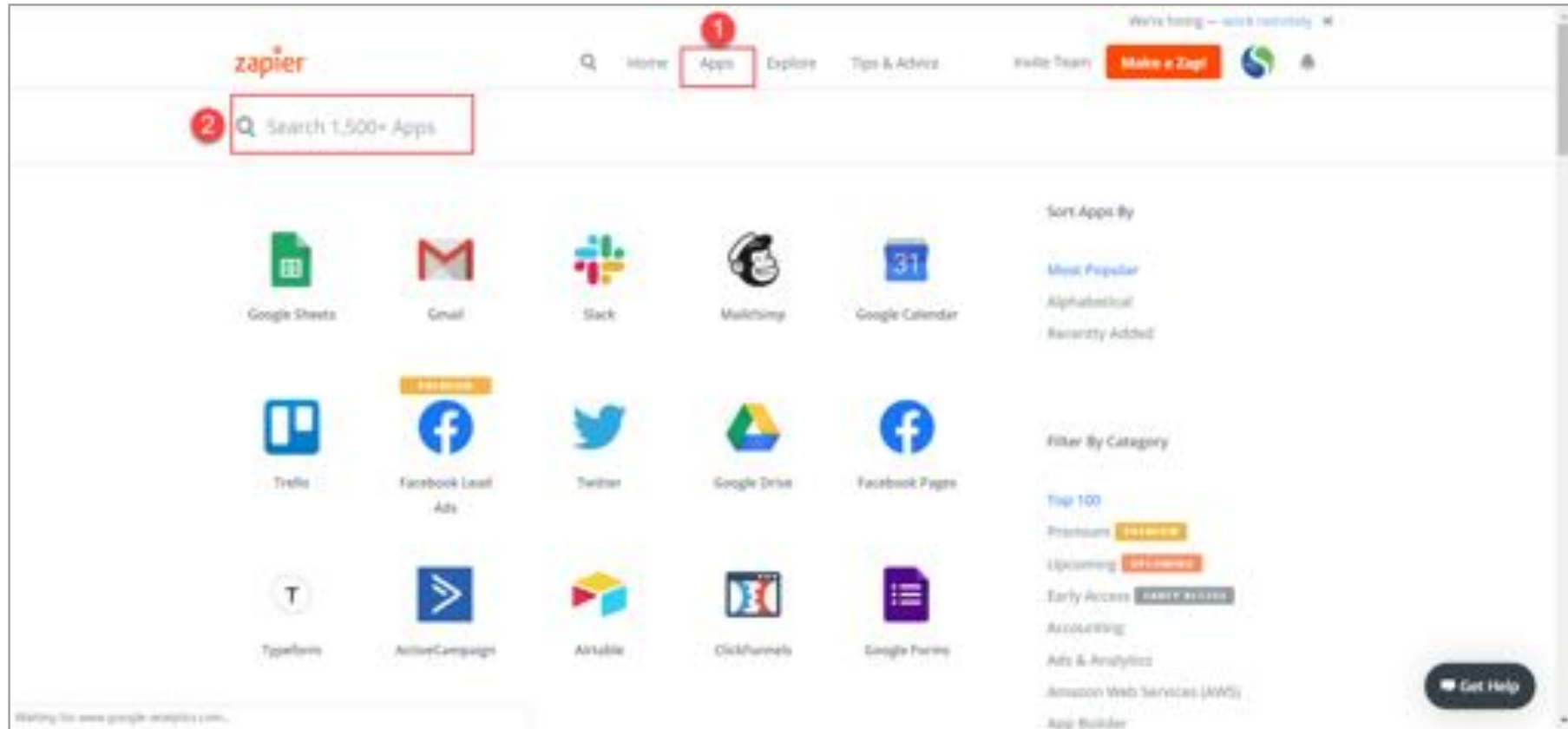
[Learn More](#)

What is Citrix ShareFile?

Citrix ShareFile is an enterprise "follow-me" data solution that makes it easy for users to store, sync and share data securely from any device, anywhere!

Navigating Zapier.

Oh, and what the heck is a trigger and an action?



Search for apps by clicking on the apps tab at www.zapier.com

Key terms in Zapier

Zap = an automated workflow between 2 or more apps

Trigger = event that starts the workflow


Task = counted each time your Zap successfully performs an action, search, or passes a filter

Built-in app = apps created by Zapier that you can use to manipulate data



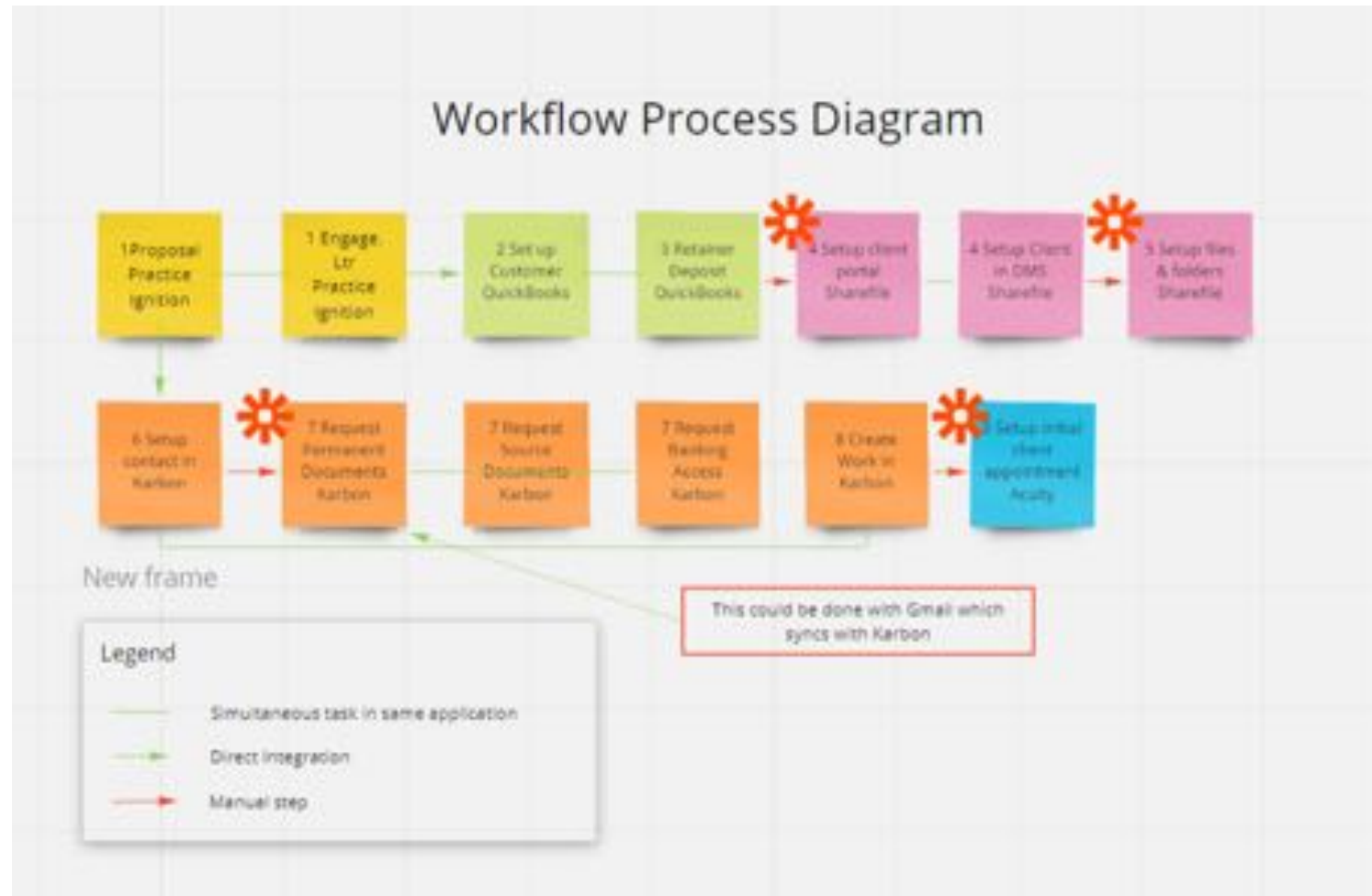
Find out if your apps are on the Zapier platform


- If an app isn't supported by Zapier, there could be other options – like webhooks!
- There are also other integration platforms like Microsoft Flow, Integromat and automate.io.

 **Client On-boarding Automation Worksheet**

Task	Step # in Process	App used	Integrations (does this app integrate with another step in the process)	Integration rating	On Zapier	On other platform (Microsoft Flow, Integromat, etc.)	Notes
Proposal	1	Practice Ignition	Practice Ignition		Yes		
Engagement Letter	1	Practice Ignition	Practice Ignition		Yes		
Create Retainer / Deposit	3	Quickbooks	Practice Ignition, Quickbooks		Yes		
Set up client portal	4	Sharefile			Yes		
Set up client in billing system	2	Quickbooks	Practice Ignition, Quickbooks		Yes		
Set up client in workflow system	6	Karbon	Practice Ignition, Karbon		Yes		
Set up initial client appointment	9	Avoka			Yes		
Request banking access / payments	7	Sharefile / Karbon			Yes		Account not set
Set up client in document management system	4	Sharefile			Yes		
Set up files / folders	5	Sharefile			Yes		
Request permanent file documents	7	Sharefile / Karbon			Yes		Account not set
Request source documents	7	Sharefile / Karbon			Yes		Account not set
Set up projects/tasks in workflow system	8	Karbon	Practice Ignition, Karbon		Yes		

Let's look at our workflow with Zapier!





What do you want to
focus on?

What do you want to focus on?

Each table will focus on a specific task, feel free to move around as you build out your workflow!

Scheduling

Billing and payments

Client communications

Document management

Proposals and engagement letters



Next Steps

Next steps

Learn more about Zapier at <https://zapier.com/learn/university/>

Take my 5-week workshop <http://bit.ly/STCZapierWorkshop>

Connect with your peers and app partners to learn tips and tricks!

A huge thank you to our facilitators and app partners



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Associates



Nayo Carter-Gray
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Juliet Aurora
AIS Solutions

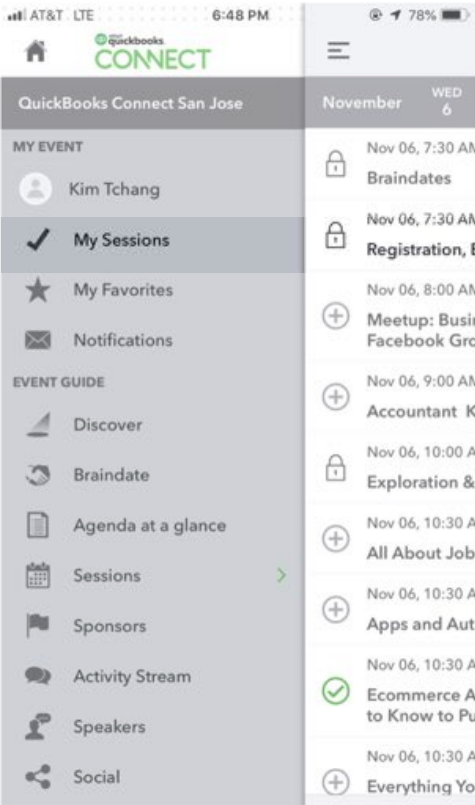


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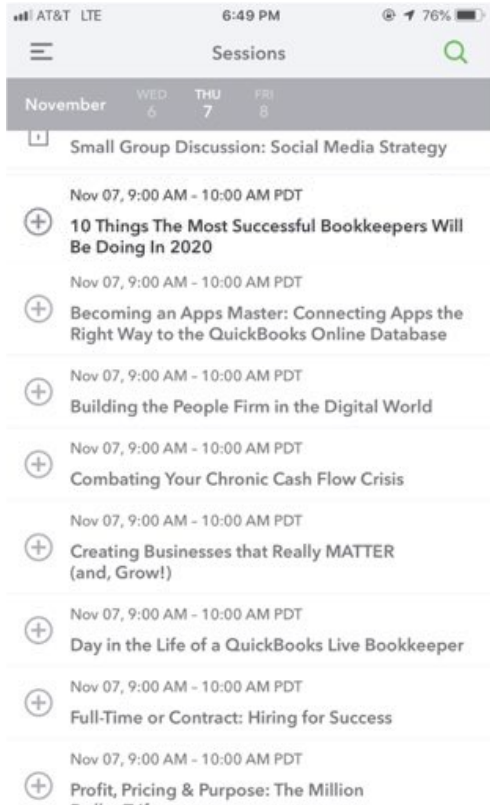
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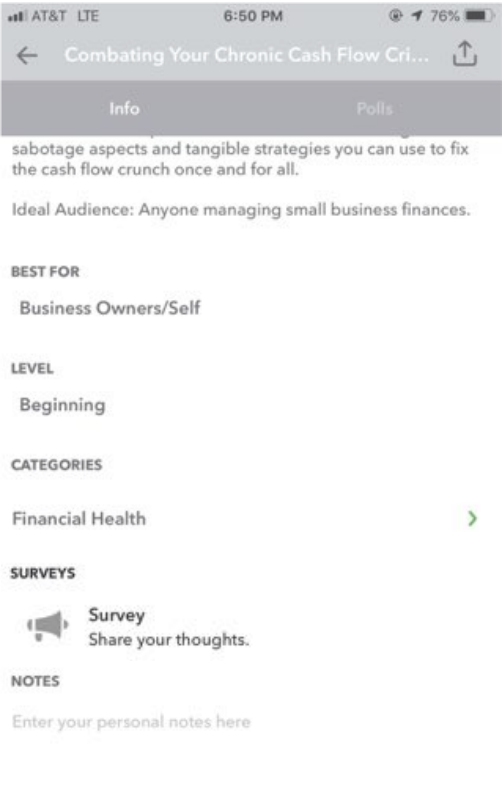
1. Select Sessions



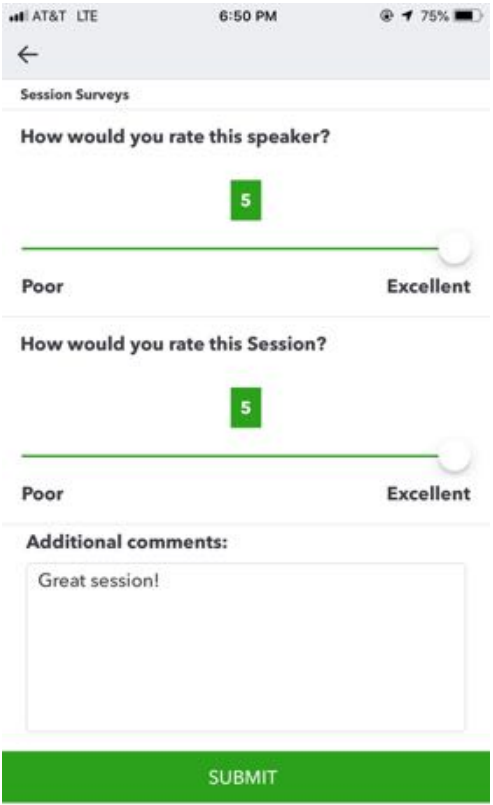
2. Select Session Title



3. Select Survey



4. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. Below the header, there are tabs for November 6 (Accountant Day), November 7 (selected), and November 8. A 'Print Agenda' link is also present. The main content area features a search bar labeled 'Search for sessions' and a row of filters: Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health, with an 'Expand all +' link. The agenda list for November 7 includes: 7:30-7:00 am (empty), 7:30-10:30 am (Registration, Breakfast & Exploration), 8:00-8:30 am (Braindates, with a description and 'Learn more' link), 8:00-8:45 am (Yoga), and a section for Breakout Sessions starting at 8:00-8:45 am, which includes Small Business Meetup, Small Group Discussions on Social Media Strategy, Showing up, and Build Your Dream Bookkeeping firm. Each session has a '+' icon for more information.

QuickBooks CONNECT

Why Attend Agenda Speakers Pricing Sponsors Travel FAQ

Register now

November 6 Accountant Day November 7 November 8

Print Agenda

Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.

Search for sessions

Filters: Business Growth Life & Business Skills Organizational Culture Technology Training Advisory Financial Health Expand all +

7:30-7:00 am

7:30-10:30 am

8:00-8:30 am

8:00-8:45 am

Registration, Breakfast & Exploration

Braindates

New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more](#)

Best for: All Audiences
CPE Hours: not eligible

Yoga

Breakout Sessions

Small Business Meetup: Relationship Marketing and the Power of Human Connection

Small Group Discussion: Social Media Strategy

Small Group Discussion: Showing up - Why What You Wear Matters

Small Group Discussion: Build Your Dream Bookkeeping firm



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FUTURE