Automate your client onboarding

Heather Satterley


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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

ZAPIER CERTIFIED 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

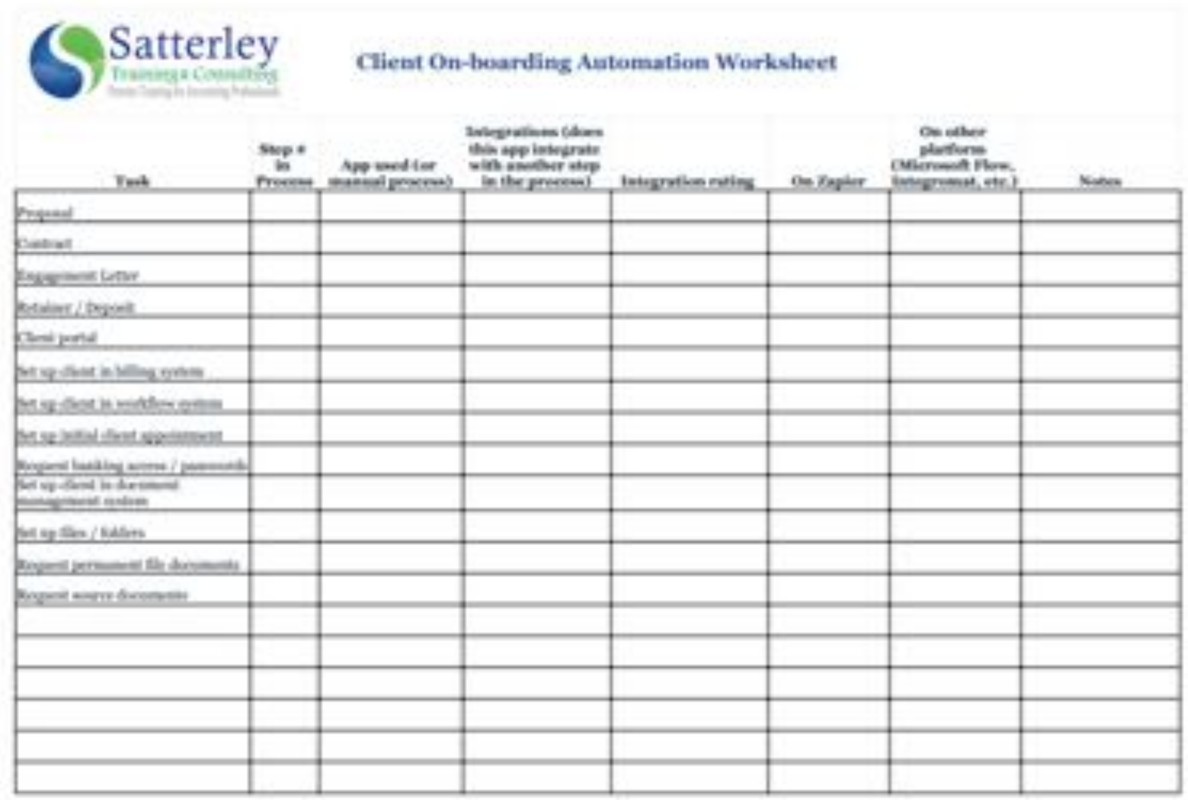
Neal Coogler
All About Business Services

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



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Client On-boarding Automation Worksheet

Task	Step # in Process	App used (or manual process)	Integrations (does this app integrate with another step in the process)	Integration rating	On Zapier	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							

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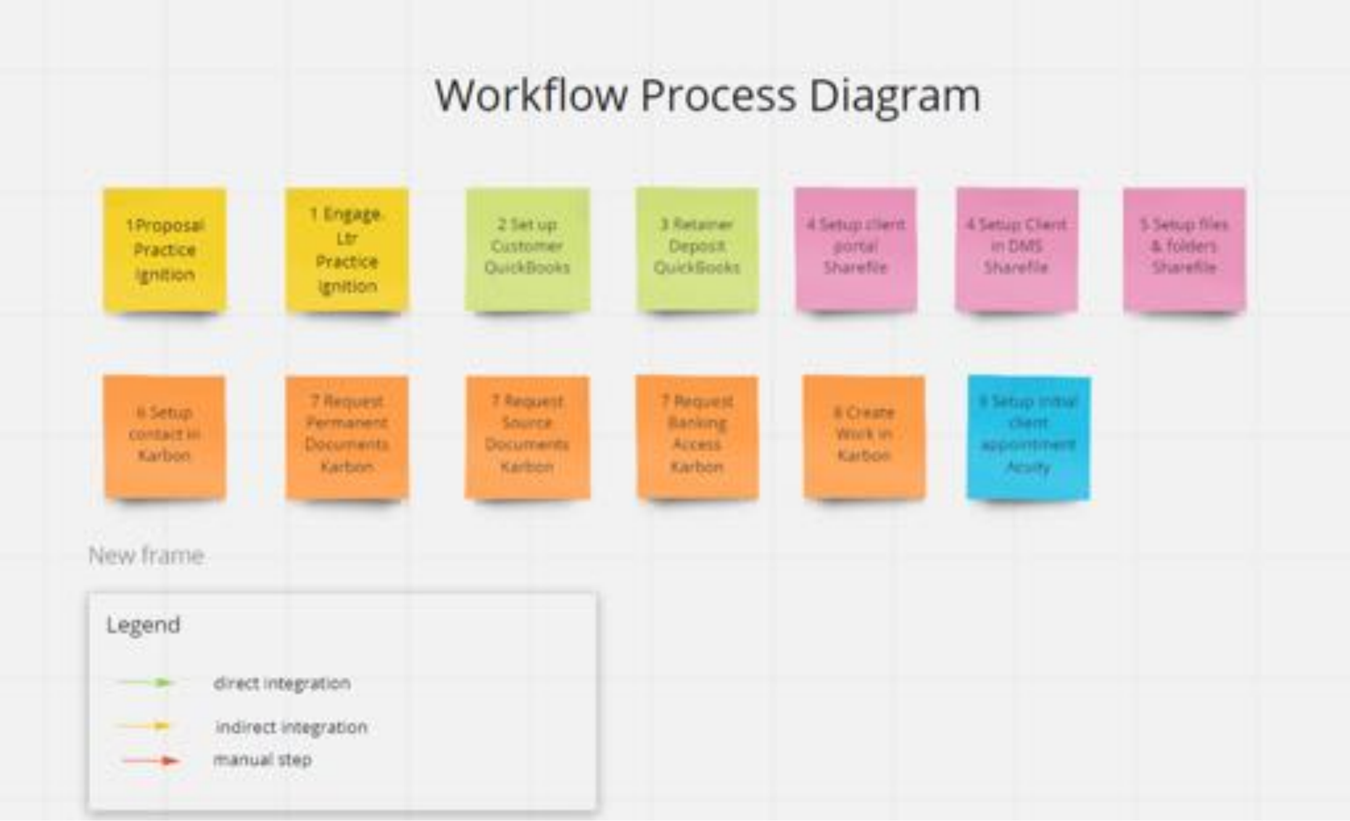
Client On-boarding Automation Worksheet

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	Karbon, QuickBooks				
Engagement Letter	1	Practice Ignition	Karbon, QuickBooks				
Create Retainer / Deposit	3	QuickBooks	Karbon, Practice Ignition				
Set up Client portal	4	[illegible]					
Set up client in billing system	2	QuickBooks	Karbon, Practice Ignition				
Set up client in workflow system	6	Karbon	Practice Ignition, QuickBooks				
Set up initial client appointment	9	[illegible]					
Request banking access / passwords	7	[illegible] / Karbon					Email with link
Set up client in document management system	4	[illegible]					
Set up files / folders	5	[illegible]					
Request permanent file documents	7	[illegible] / Karbon					Email with link
Request source documents	7	[illegible] / Karbon					Email with link
Set up projects/tasks in workflow system	8	Karbon	Practice Ignition, QuickBooks				

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

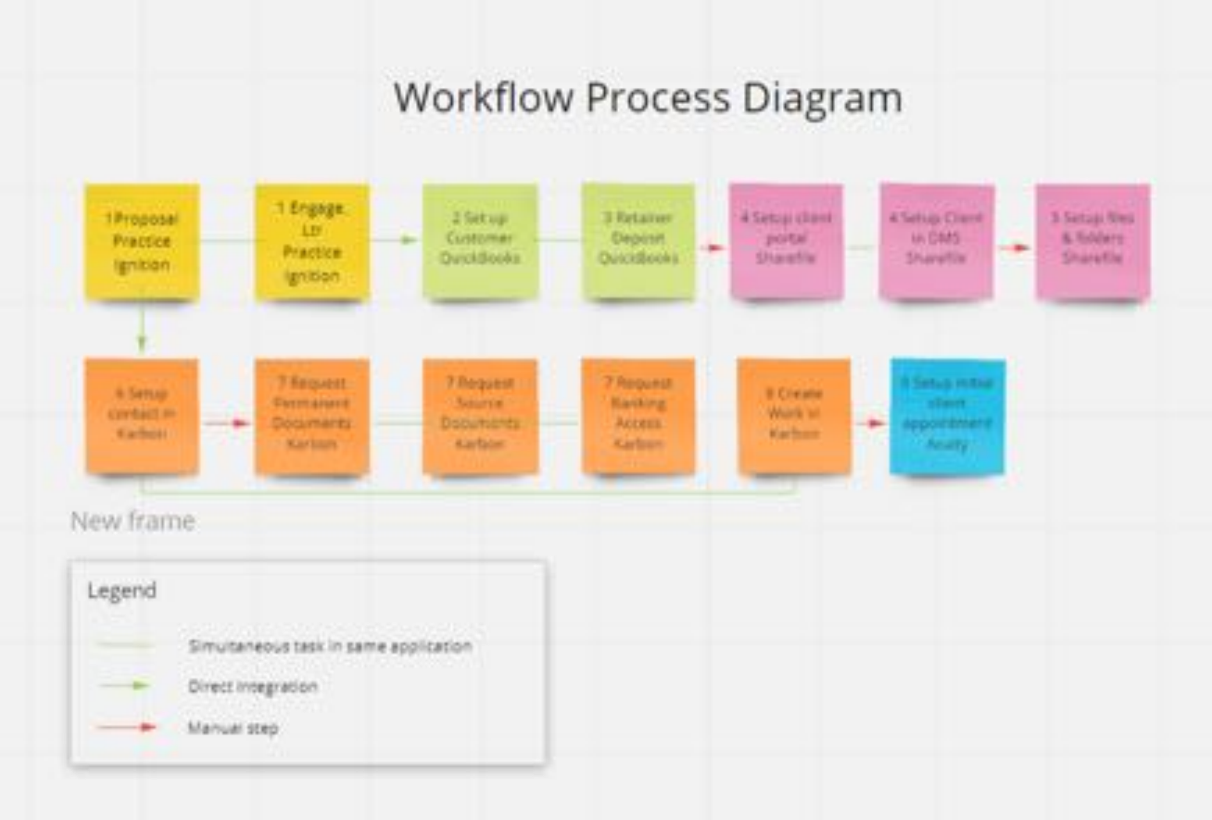


- Use the Process Mapping Worksheet as your guide
- Choose a highlighter color for each app used in your process
- Use the sticky notes to create your tasks
- Place them in order on the Workflow Process Diagram

This workflow process diagram was built on miro.com

Identify integrations

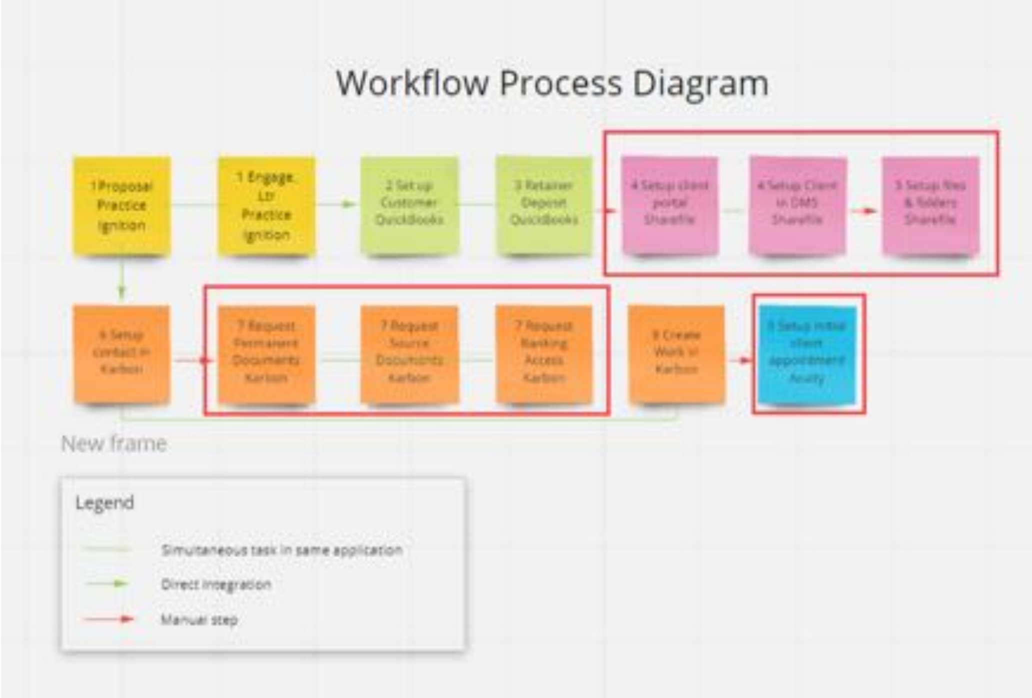
Use the Workflow Process Worksheet provided



- 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

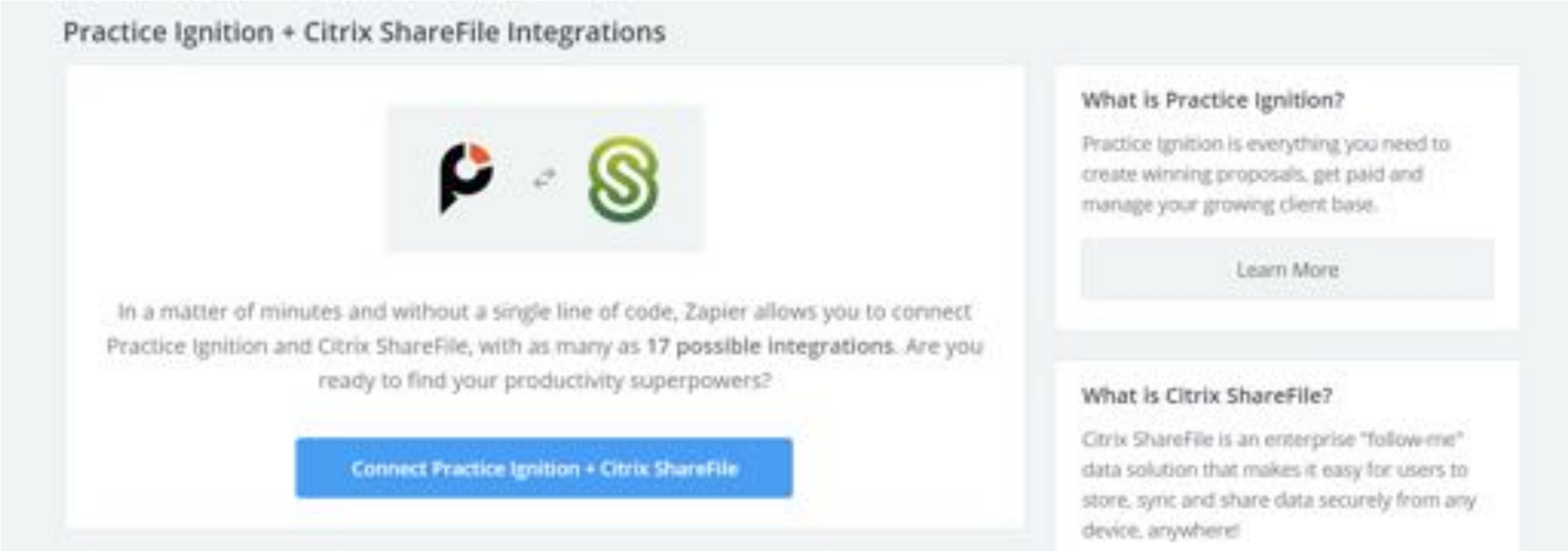
Automate your workflow with Zapier

What is Zapier?

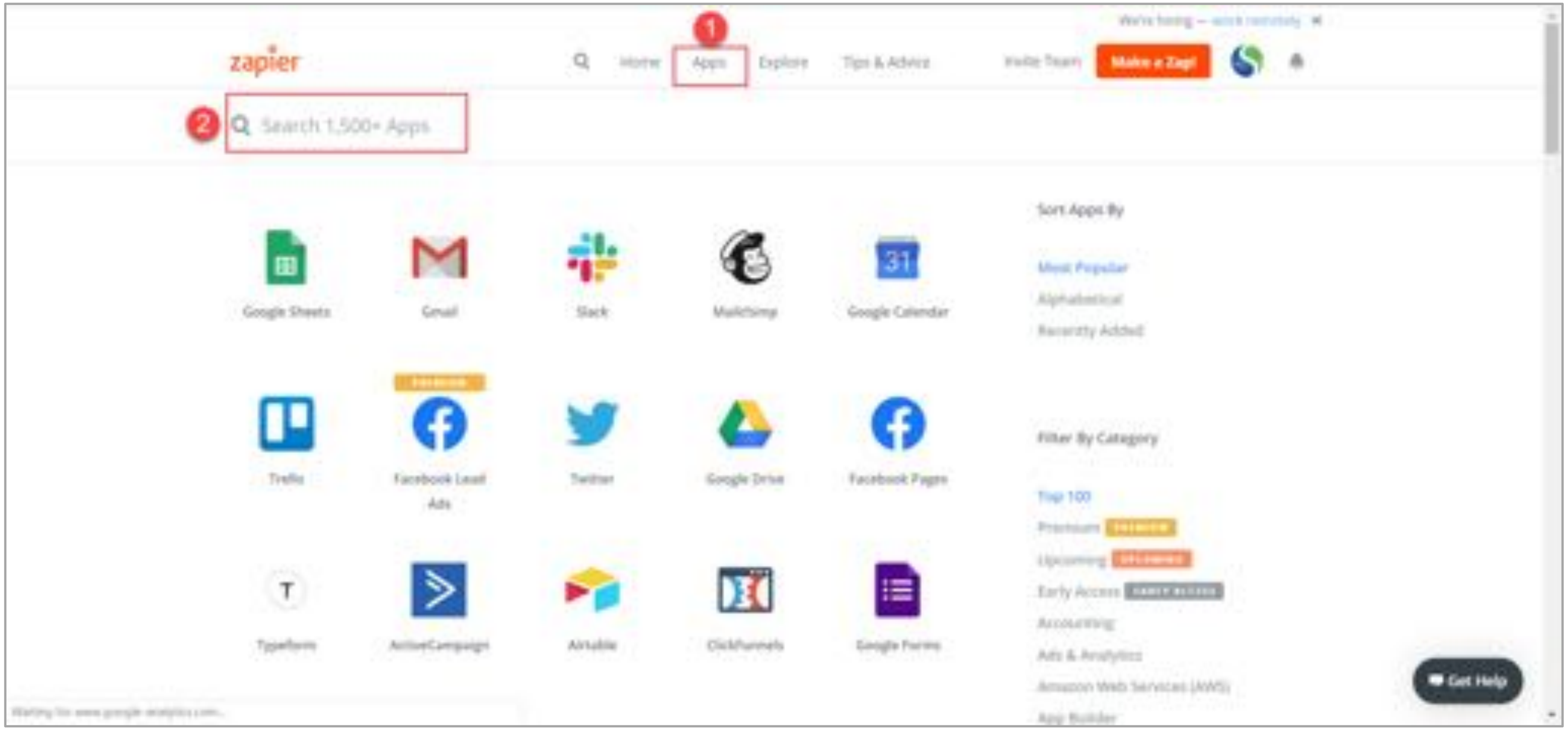
Zapier is a no-code integration tool that connects over 1,500 apps

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?



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

zapier

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.

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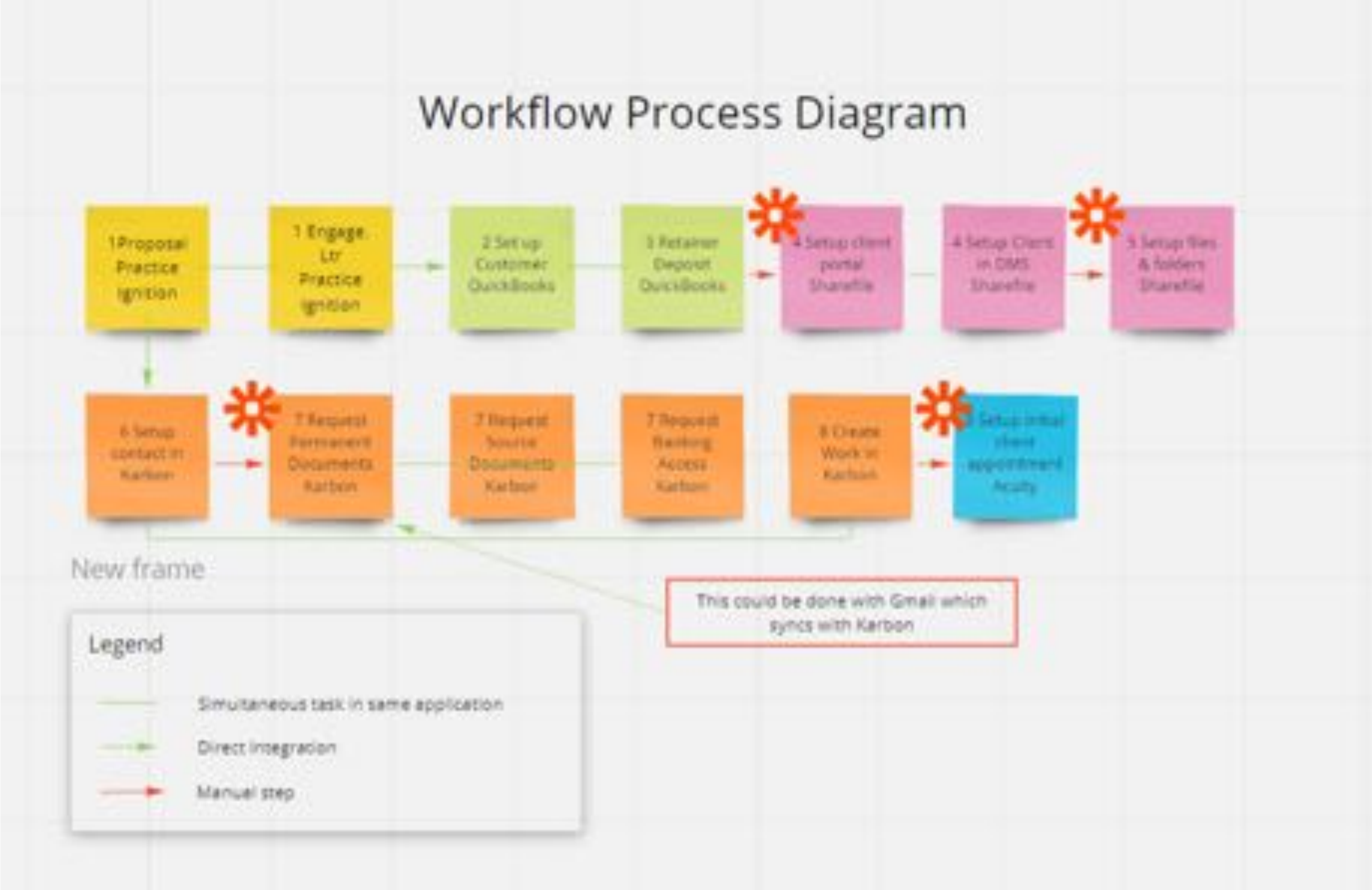
Client On-boarding Automation Worksheet

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	[illegible]		[illegible]		
Engagement Letter	1	Practice Ignition	[illegible]		[illegible]		
Create Retainer / Deposit	3	QuickBooks	[illegible]		[illegible]		
Set up Client portal	4	ShareFile			[illegible]		
Set up client in billing system	2	QuickBooks	[illegible]		[illegible]		
Set up client in workflow system	6	Karbon	[illegible]		[illegible]		
Set up initial client appointment	6	Acuity			[illegible]		
Request banking access / passwords	7	ShareFile / Karbon			[illegible]		[illegible]
Set up client in document management system	4	ShareFile			[illegible]		
Set up files / folders	5	ShareFile			[illegible]		
Request permanent file documents	7	ShareFile / Karbon			[illegible]		[illegible]
Request source documents	7	ShareFile / Karbon			[illegible]		[illegible]
Set up projects/tasks in workflow system	8	Karbon	[illegible]		[illegible]		

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

Jan Huago
Jan Huago & Associates

Nayo Carter-Gray
1st Step Accounting, LLC

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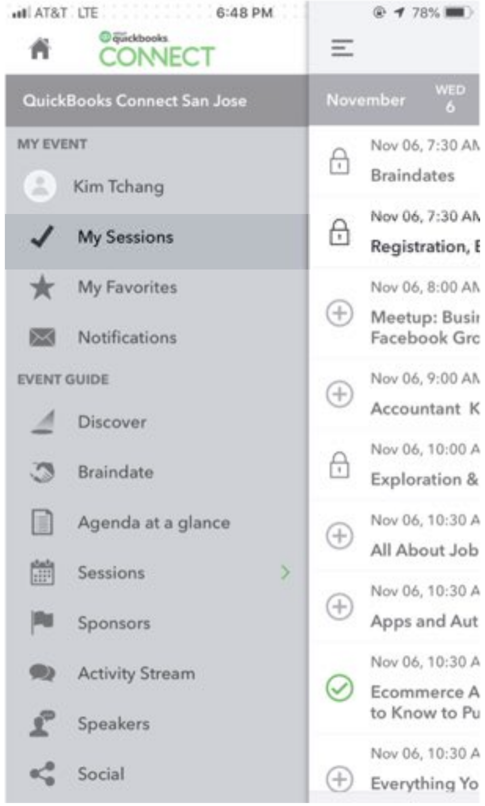

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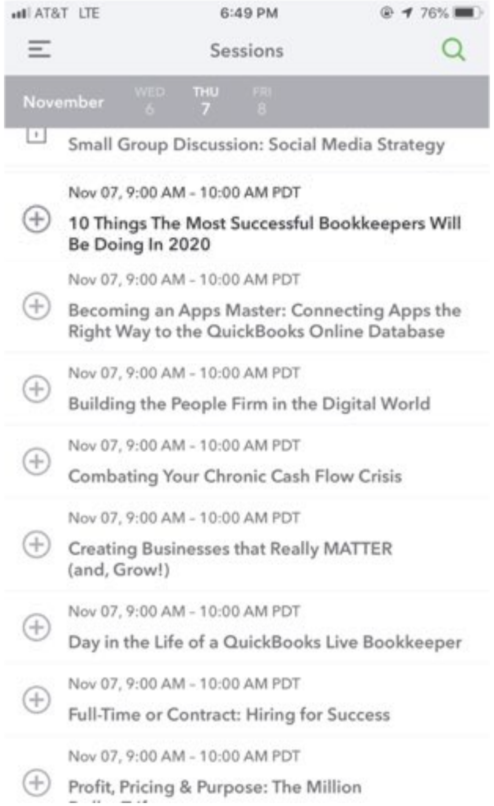

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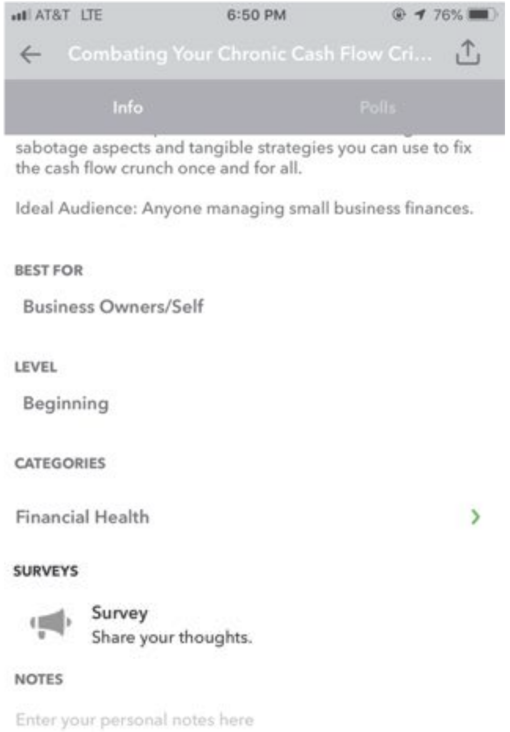

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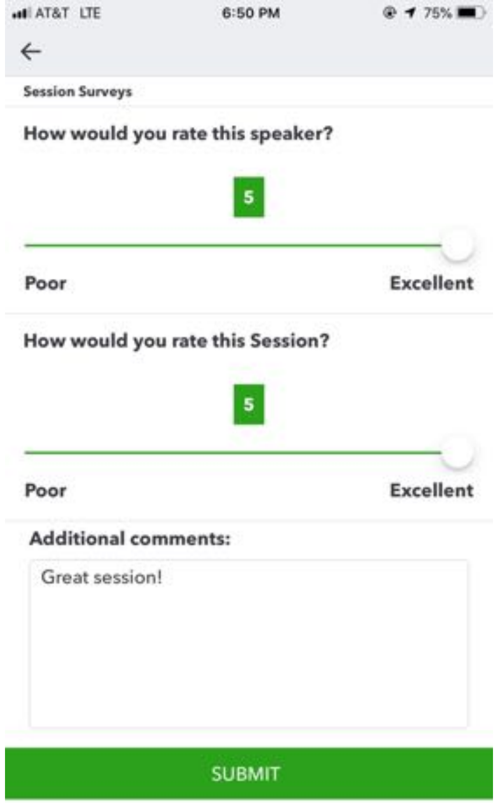

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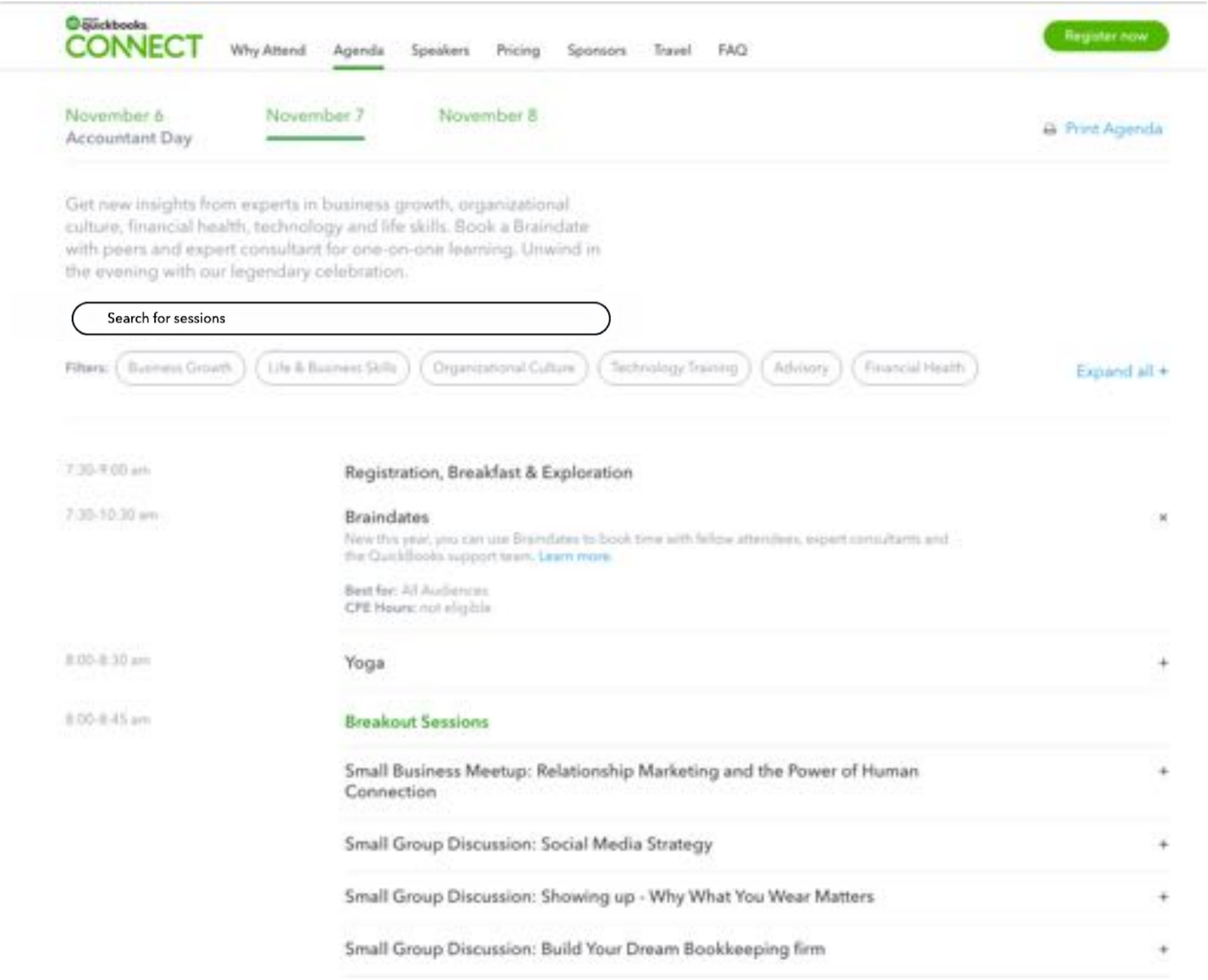

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