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Workshop Downloads

Client Communication Workshop
http://bit.ly/IgniteManageClients

Workflow Workshop
http://bit.ly/AppVettingForm

Onboarding Workshop
http://bit.ly/OnboardingGformWF

OWN THE FUTURE

Laptops running?
Pen and paper out?

“

Let’s do this thing!

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Workflow & client communication workshop

Kellie Parks, CPB

#QBConnect | WiFi: QBConnect

OWN THE FUTURE

CPD Process

In order to receive CPD 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 **3 CPD credits**
- CPD 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 speaker

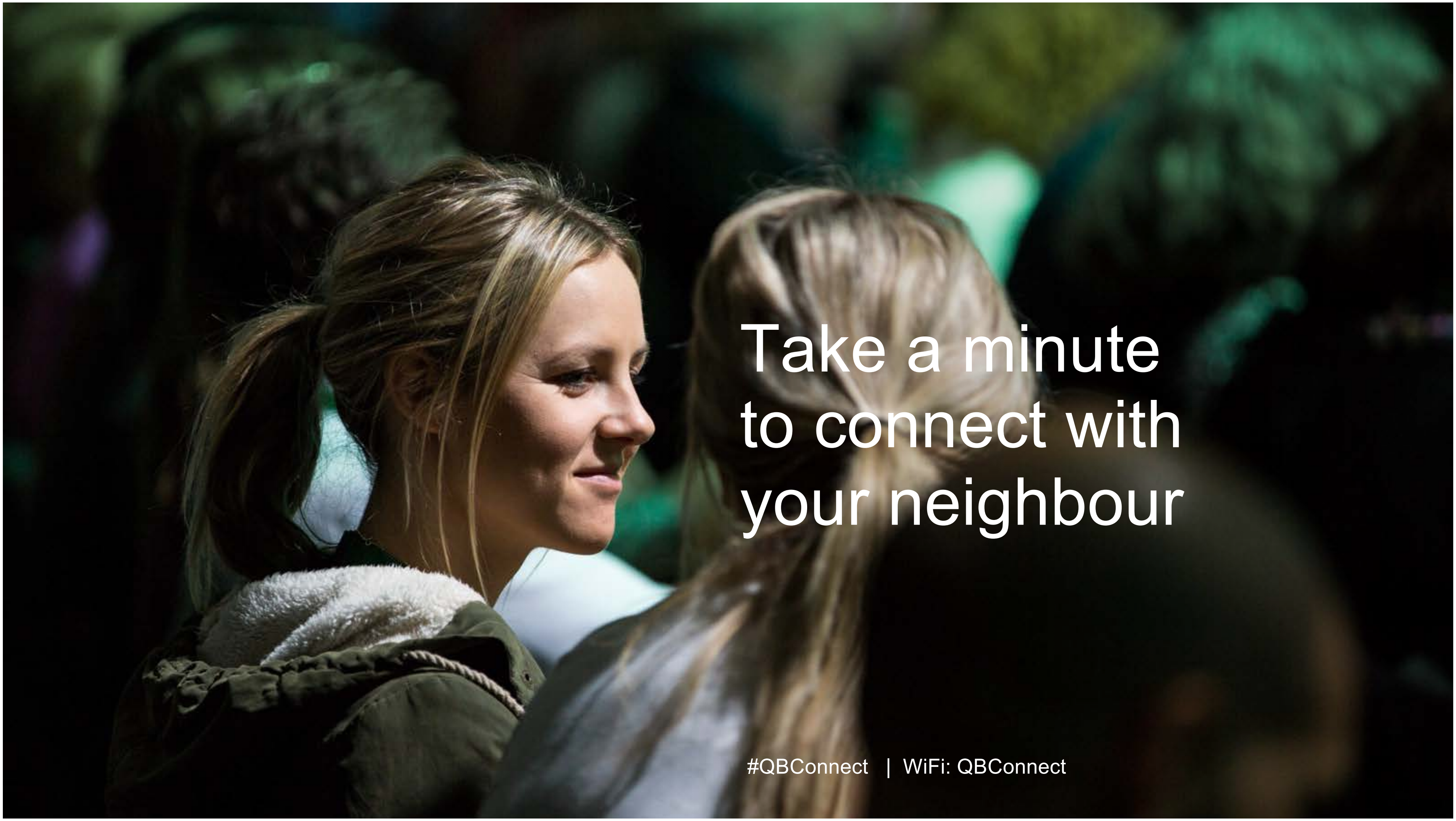
I am a relentless organizer and believe cloud financial technology is key to organization

I'm a proud member of the Intuit Trainer Writer Network.

Kellie Parks, CPB

Cloud Accounting Aficionado

@kellie_parks


Take a minute
to connect with
your neighbour
#QBConnect | WiFi: QBConnect

Agenda

Let's set our client expectations and get our business processes & oversight working for us

Client Communication Workshop

Best practices and systems for communications & conflict resolution

Workflow Workshop

Creating, managing and building out workflows that work - including vetting your application needs

Onboarding Workshop

Developing a process to lighten the onboarding load - for you and your shiny new client

This workshop is all about creating communications, best practices, processes, systems and workflows to tame chaos

BEST PRACTICES SYSTEMS, COMMUNICATIONS & CONFLICT RESOLUTION

Managing Clients

This is an interactive workshop!

This is you and your peers sharing and collaborating

And you get a form to help you create your Client Management Best Practices

Client communication workshop

Download the worksheet here.

http://bit.ly/ConnectManageClients

Client Management Best Practices

Save it to your cloud storage.

Fill in your answers.

Add in sections or Qs as you see fit.

Use this as a live, ongoing document.

COMMUNICATION

Do you have a communication statement?

COMMUNICATION

What do you use to communicate?

Email, text, FBMessenger…?

COMMUNICATION

How about the telephone?

I know, crazy, right?!

COMMUNICATION

No client bashing in this session.

COMMUNICATION

What don’t you allow, what are your boundaries?

Why not?

COMMUNICATION

What happens if it doesn't work?

Are you enforcing your boundaries.?

COMMUNICATION

What have you encountered that you've had to come up with a solution to create your boundaries?

COMMUNICATION

Are you using a scheduler?!

You will never look back.

“Are The Dogs Running The Shelter?”

The people least capable of running a group or organization are now in charge. Said especially when the result is total chaos or calamity.

“Are The Dogs Running The Shelter?”

Okay that wasn’t actually the correct attribution to the statement….

Gratuitous Dog Photo Alert

DOCUMENT SHARING

How's that going?!

Right!?

DOCUMENT SHARING

Is the problem the client?

Or is it that you aren't setting expectations?

DOCUMENT SHARING

Perhaps you have a hand in this.

Just saying...

Non secure & source document sharing

How are you getting them?

What do you do if you don’t get them?

How do you move on with your work?

How do you make the financials accurate and timely?

Non secure & source document sharing

What do you consider secure?

How do you create security?

How are you getting sensitive information to and from each other?

- Web Portal, Sharefile, Sync.com?

Are you emailing Reports?

CONFLICT RESOLUTION

We are not dealing with who owns the data.

CONFLICT RESOLUTION

Is the problem the client or is it that you aren't setting expectations?

Gotcha thinking didn't I?

PICK UP THE PHONE!


GIVE THEM A CALL
I'VE EMAILED
BE QUICK TO CALL
I TEXTED THEM AS WELL
JUST CALL THEM
I'LL SEND THEM ANOTHER EMAIL

CONFLICT RESOLUTION

Engagement contracts.

Do you have one? [Intuit does!]

If the client isn't a fit do you have a process rehome in a quick, respectful manner?

CONFLICT RESOLUTION

Not all endings are bad.

CONFLICT RESOLUTION

If the client is actually a meanie head don't own it.

Just move on, respectfully.

"You can't save them all".

Dis-engagement contracts?

Got one?

You need one.

Here’s a link to a sample one.

https://www.loom.com/share/a71cf93361934f799d4e9c27cc1a6211

You and your clients are in this together.

Set the expectations.

Communicate them clearly.

Develop your ideal client profile.

PATHWAYS TO WORKFLOW CREATION

Pathways to workflow creation

Download the app worksheet here.

http://bit.ly/AppVettingForm

Recipe

What are workflows?

"Think of them as recipes"

What are workflows?

“Think of them as recipes”.

Thank you Esther Friedberg Karp for such a succinct analogy.

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Certified in the US, Canada, and UK

Member, Intuit Trainer / Writer Network (TWN)

Insightful Accountant’s Top 10 / 100 ProAdvisors 2015-19
Top International Advisor 2015 | Top Trainer/Writer 2019

Practice Ignition’s Top 50 Women in Accounting 2017

Top 10 Influencers in CDN Bookkeeping World 2018

What are workflows?

"Think of them as recipes".

- **Ingredients - the key things you need to get the work done.**
- **Instructions - the checklists to follow in the correct order.**
- **Tips - the best practices to achieve the outcome to its fullest.**
- **And for the win, pictures (screenshots) and/or videos linked in!**

What are workflows?

In my home we even have assigned team members.

My husband makes the pastry for our Tourtieres and I'm in charge of the filling and cream corn sauce.

Pathways to workflow creation

The basics of workflows

- Getting started

Workflow application analysis

- Business time sucks and woes
- Business management app feature suggestions
- Business management applications

Workflow creation

- Process mapping
- Workflows as checklists

The basics of workflows

- In this hour together we will walk through an app analysis and help you discover what your fit & feel for them looks like
- We will see who talks to each other and why that is a key element of choosing an app or maximizing the value of it for you
- And we walk through creating workflows that… work for you!

The basics of workflows

Workflows create a logical, effective order of events to complete these tasks

- Consistently - client to client, niche to niche, team member to team member
- The tasks, to dos, responsibilities are laid out in template workflows
- No waffling, wavering, overthinking of what needs to be done next

Or what to start with

The basics of workflows

Have your spreadsheet, my form you just downloaded, your workflow application and doc creation program up and running and let's all leave this session with a great start to your workflows and applications to vet/maximize!

Creating a workflow

Define — the Outcome(s)

Map — the the tasks, communications & actions

detail who is doing what

Document — the processes

Systemize — in an application

Automate — the workflow

Test — and test again

- The basics of workflow creation.

“

Stop overthinking!

What are the next steps?

Template communications

- Start with the easy ones - emails

Clean up contacts

Get an online scheduler

Video ourselves while working

Process and project are two different animals

Process - usually repeating: the work you do, how you do it and who does it

- Workflows are processes

Project - an outcome, goal or end result: who you are going to do the work for, with and why

- Clients are a project

Firm overview is not a workflow!

- Workflow is getting the work done and achieving desired outcomes
- Overview is what work has been done for who, by who

Workflow Application Analysis

The elements and applications you need to create workflows.

Documentation	Task Lists	Integration
Client Portals	List	All in ones
Questionnaires	Kanban	Native
Contracts	Form	Zapier

Workflow application analysis

- Business time sucks and woes
- Business management app feature suggestions
- Business management applications

Business time sucks and woes

- [ ] Missed deadlines.
- [ ] Managing email.
- [ ] Onboarding clients and engagement contracts.
- [ ] Tracking my work.
- [ ] Deciding what to do next.
- [ ] Tracking my team's work.
- [ ] Deciding what what my team needs to do next.
- [ ] Generally getting $#!+ done. Lack of focus.
- [ ] Tracking my meetings and events.
- [ ] Document sharing with clients. Requesting documents, and then requesting them again!
- [ ] Communicating with clients. Email, Slack, text. Do you have too many options?
- [ ] Communicating with clients. Do you need to manage expectations?
- [ ] Communicating with clients. Do you need to create a client facing handbook?

Business management app feature suggestions

- [ ] Robust CRM. Custom fields, secure storage of passwords, mail campaigns.
- [ ] Robust client portal. Secure, client can upload, commenting on documents.
- [ ] Templated communications.
- [ ] Lead capture.
- [ ] Mail campaigns.
- [ ] Basic client portal.
- [ ] Email integration.
- [ ] Calendar integration.
- [ ] Cloud Fin Tech integration. Accounting program, document management app...
- [ ] Zapier integration.
- [ ] Turn email into tasks or work.

Business management app feature suggestions

- [ ] Basic workflow checklists.
- [ ] Workflow checklists with actions (emails, contracts, questionnaires) as steps built in the workflow list.
- [ ] Customer can participate in workflow within the app.
- [ ] Client can use with out needing an app.
- [ ] Conversation mode.
- [ ] Geared to team. High user level visibility and permission levels.
- [ ] In app sheduler.
- [ ] Invoicing and receiving payments.
- [ ] eSignature.

Business management app feature suggestions

- [ ] Free.
- [ ] Flat fee.
- [ ] Price per user.
- [ ] One app to rule them all.
- [ ] I don't mind having a few apps to run my show.

Workflow Applications

All include Zapier in my world view - some of these don't have it yet

Karbon - Aero - Jetpack - TaxDome - Time Hero - Click up

17Hats or Dubsado

GSuite Form - Mail - Sheets

Here's a link to
my app partner page

I have vetted them and either use them myself or love them for the automagicalness they create for businesses.

Do not develop SAAS (Shiny App Attention Syndrome)!

Connect Your Applications

Connect your applications

- Map what you want to connect
- Is there a native integration?
- Can you use links?
- Can they be connected using an app integrator?

Learn Zapier

Not in a complicated, need to know all about Zapier way

- In a what is a simple Zap that could solve a time suck, menial task way
- It will let your apps speak nicely to each other
  - Automagically Zap contact information to Zapier supported programs (there are more than 1,500 apps they can integrate!).
- And scheduler is the bomb!
  - GDrive monthly folders

FROM	TO
Without Zapier	With Zapier
Copy/Paste	
Download CSV - Map - Upload ...map again	Automagical sharing of information
Mistakes and data not matching in applications	Exact duplication of information
Scheduling or remembering to send communications	Creating automated communication schedules - once!
Creating clients folders	You know, to having them done for you

Native integrations may be enabled.
Check on those before willy nilly creating Zaps!

Zapier makes you happier!

Workflow Creation.

Map what needs to get done

Scribble it out on paper or in an app

Tasks	Communications	Who	When	Outcomes
What needs to get done	Call to action, information gathering, contracting	Team levels, clients	Info in, actions and tasks	What's the why

Workflow creation starts in a spreadsheet

Step 1

Start with the main tasks as a row header

Step 2

List the tasks vertically

Step 3

List the need to know notes and best practices vertically in another column

Step 4

Due dates are vertical

I use the first column for these

Step 5

Add video links

Workflow creation starts in a spreadsheet

Step 6	Step 7	Step 8	Step 9	Big Win!
Colour code your actions	Get some time frames in there too	How about some checkboxes?	How about some links to your templates like emails/contracts?	**You started with a task list and actually created a workflow!**

Gratuitous Dog Photos.

Defining your Ideal Client creates effectiveness in your workflows

You know what the work is going to be

You know what the communication looks like

You know what your tech stack is

This creates clarity, consistency, efficiency and predictability

For you

For your clients

For your team

TAKING THE PAIN OUT OF ONBOARDING

Taking the pain out of onboarding

- Why you need an onboarding workflow
- Onboarding tech stack
- Key elements of an onboarding workflow
- Building an onboarding workflow

Taking the pain out of onboarding

Download the Google Form Workflow.

http://bit.ly/OnboardingGformWF

Why you need an onboarding workflow

“

Make it easy so it gets done!

Why you need an onboarding workflow

- You have set the clients' expectations
- You aren't wasting time with mis-fits
- You have all the information you need located in a single place
- You don't need to go back to them in dribs and drabs
- You start the relationship off on an organized, professional high note

When you are ready to begin collaborating with them, you are actually ready to begin collaborating with them!

Onboarding tech stack

Onboarding Tech Stacks

All include Zapier in my world view

Pipedrive - Typeform - Practice Ignition

17Hats or Dubsado

GSuite Form/Mail - Pandadoc - Sheets

Key elements of an onboarding workflow

Creating a workflow

Define
the Outcome(s)

Map
the the tasks, communications & actions
detail who is doing what

Document
the processes

Systemize
in an application

Automate
the workflow

Test
and test again

Key contracts

Engagement

Re-Engagement

Re-homing

Source Documents Not Reviewed

File Review

App Access

Let's brainstorm some others

Key information sharing platforms

Client portal

Document management apps

Linked spreadsheets

Let's brainstorm some others

Building an onboarding workflow

Map what needs to get done

Scribble it out on paper or in an app

Tasks	Communications	Sharing	When	Outcomes
What needs to get done	Call to action, information gathering, contracting	Applications needed	Info in, actions and tasks	What's the why

Phases of onboarding

Qualify
- Prospect Q
- Handbook or documents to set expectations
- Ideal client profile created

Quote
- Review the files first!
- Detail who is doing what

Gather
- PAD implemented
- Business documents & details
- Reconciliation, payroll
- Related contacts' info

Contract
- Set the expectations
- Create a legal shield

Educate
- Empower and build confidence in their role and apps

Enjoy
- Empowered, confident clients
- Respectful relationships
- A seamless start to beginning your collaboration

Workflow creation starts in a spreadsheet

Step 1	Step 2	Step 3	Step 4	Step 5
Start with the main tasks as a row header	List the tasks vertically	List the need to know notes and best practices vertically in another column	Due dates are vertical I use the first column for these	Add video links

Workflow creation starts in a spreadsheet

Step 6

Colour code your actions

Step 7

Get some time frames in there too

Step 8

How about some checkboxes?

Step 9

How about some links to your templates like emails/contracts?

Big Win!

You started with a task list and actually created a workflow!

Questions?

What are the big wins with having a button down onboarding process?

- You have set the clients' expectations
- You have all the information you need located in a single place
- You don't need to go back to them in dribs and drabs
- You start the relationship off on an organized, professional high note

When you are ready to begin collaborating with them, you are actually ready to begin collaborating with them!

What are the big wins with having a button down onboarding process?

You are no longer in a disorganized, time-sucking, energy sapping cycle when you finally get that shiny new client

...or when you need to rehome one!

Thank you!

Kellie Parks
#SaasyAccountingCoach

Fill out the survey!

Intuit really, really cares about delivering valuable, actionable content.

So let them know how we are all doing at achieving these goals.

Rate this Session on the QuickBooks Connect Mobile App

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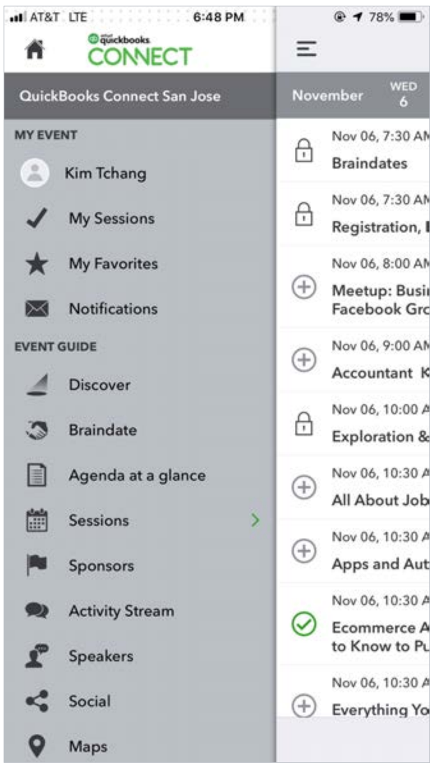
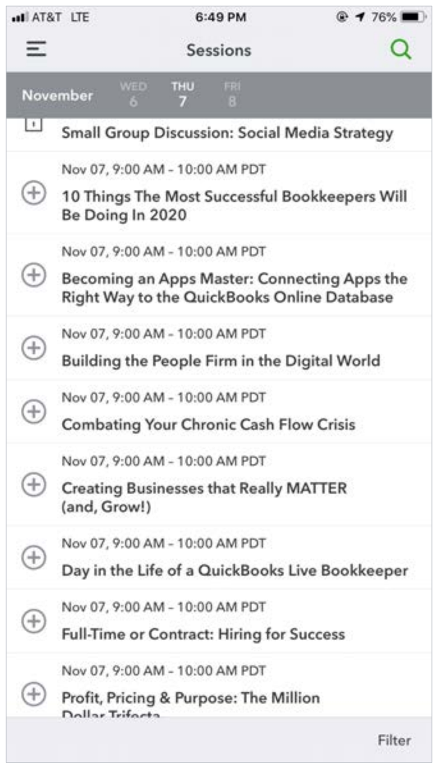


2. Select **Session Title**



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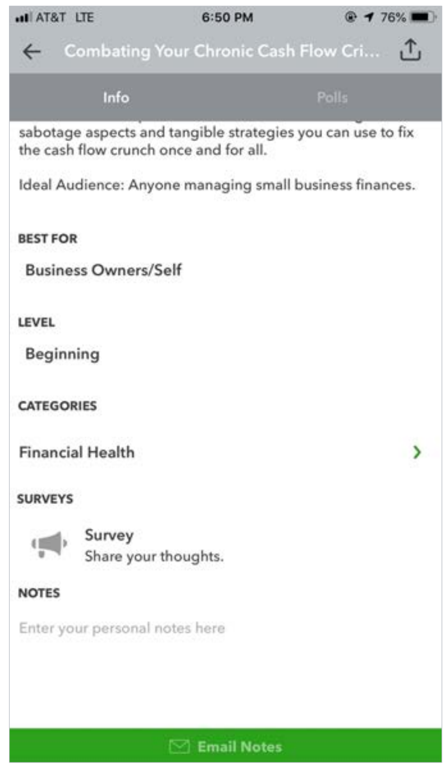

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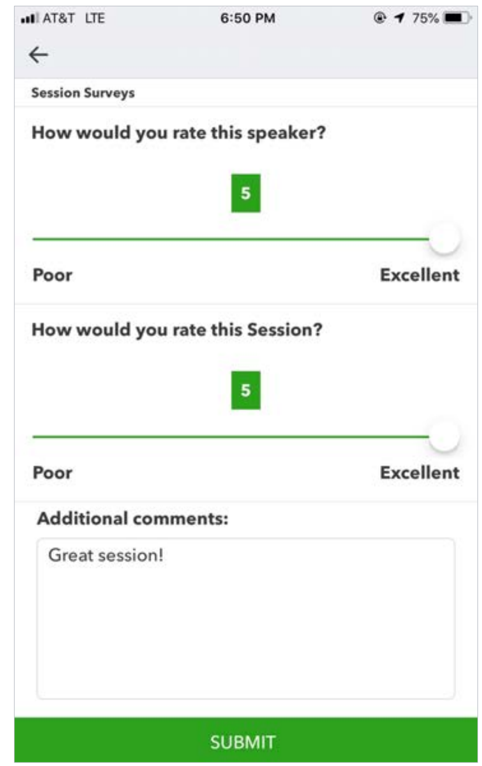

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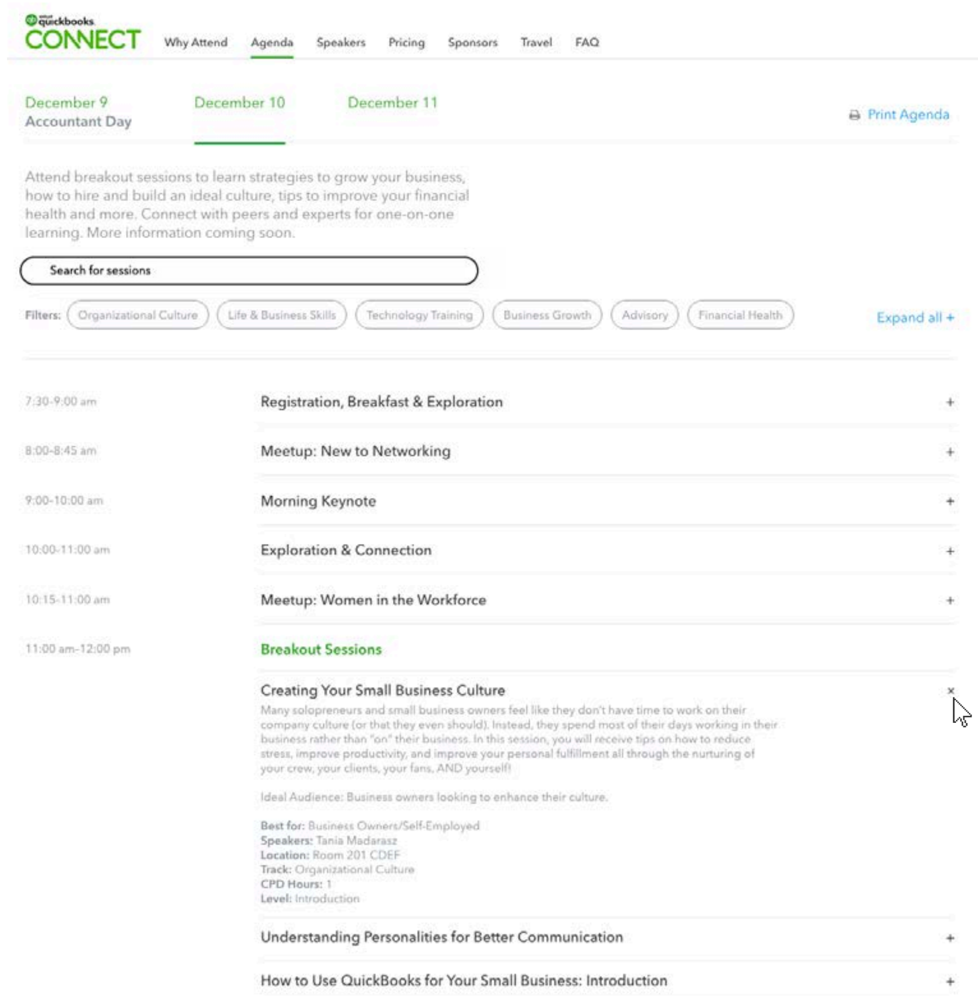
1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

https://can.quickbooksconnect.com/agenda/



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