Using onboarding as a marketing tool to win clients faster

Karen Reyburn

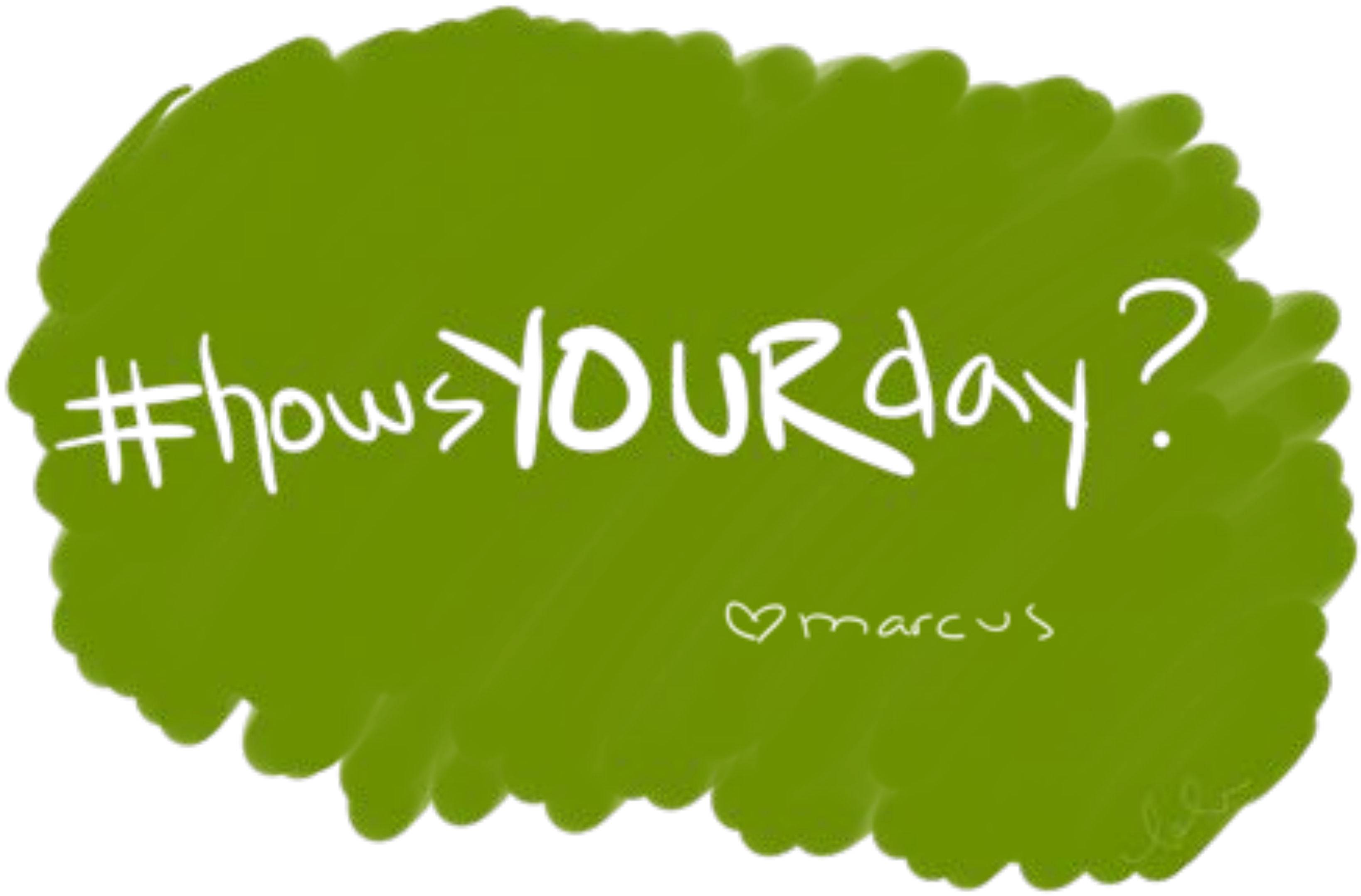
Today's speaker

Karen Reyburn

Founder, PF

@karenlreyburn


Harry Potter


#howsYOURday?
♡marcus

“Bad” clients

YOU are responsible
in your accounting business
to set the **boundaries**
so they know what choices
are **okay**, and not okay

YOU are responsible
in your accounting business
to set the boundaries
so they know what choices,
what behaviours
are okay, and not okay


Tower of London
Welcome to the Tower

In the area of clients, you – and only you – have the full authority to set the boundary fences around choosing and keeping clients for your firm.

“

Onboarding is the process of setting good boundaries so you never have a bad client again.

Onboarding is the process of setting and communicating good boundaries so you never have a bad client again.

Values boundaries

PF internal values

Show transparency

Have an opinion

Stay positive

Take responsibility

Be gracious

Collaborate

Show transparency:

We share the right things at the right time to build relationship.

Being transparent doesn't mean sharing everything all the time: it means sharing the right things at the right time so you can build relationship.

We believe in vulnerability, and being humble enough to say we don't know or we are confused or hurt or frustrated, if need be.

We give the truth, and we expect the truth in return, even if you're not sure why you think or feel that way. Even if you think you might hurt our feelings. Even if you believe we may disagree.

You're entitled to your opinions and feelings, and transparency means we are all operating on the same page - not acting on the basis of stories we are making up in our heads.

We believe in sharing "The story I'm telling myself is", so that we can together get to the truth. And have the best possible relationship because of it.

Have an opinion:

We know what we think, and are able to explain why.

We won't simply agree to be agreeable.


the designerCPA
You + Us = Financial Freedom
inside
cover

Behaviour boundaries

Behaviour boundaries

Communication - when and where?

Fees - how much and for what?

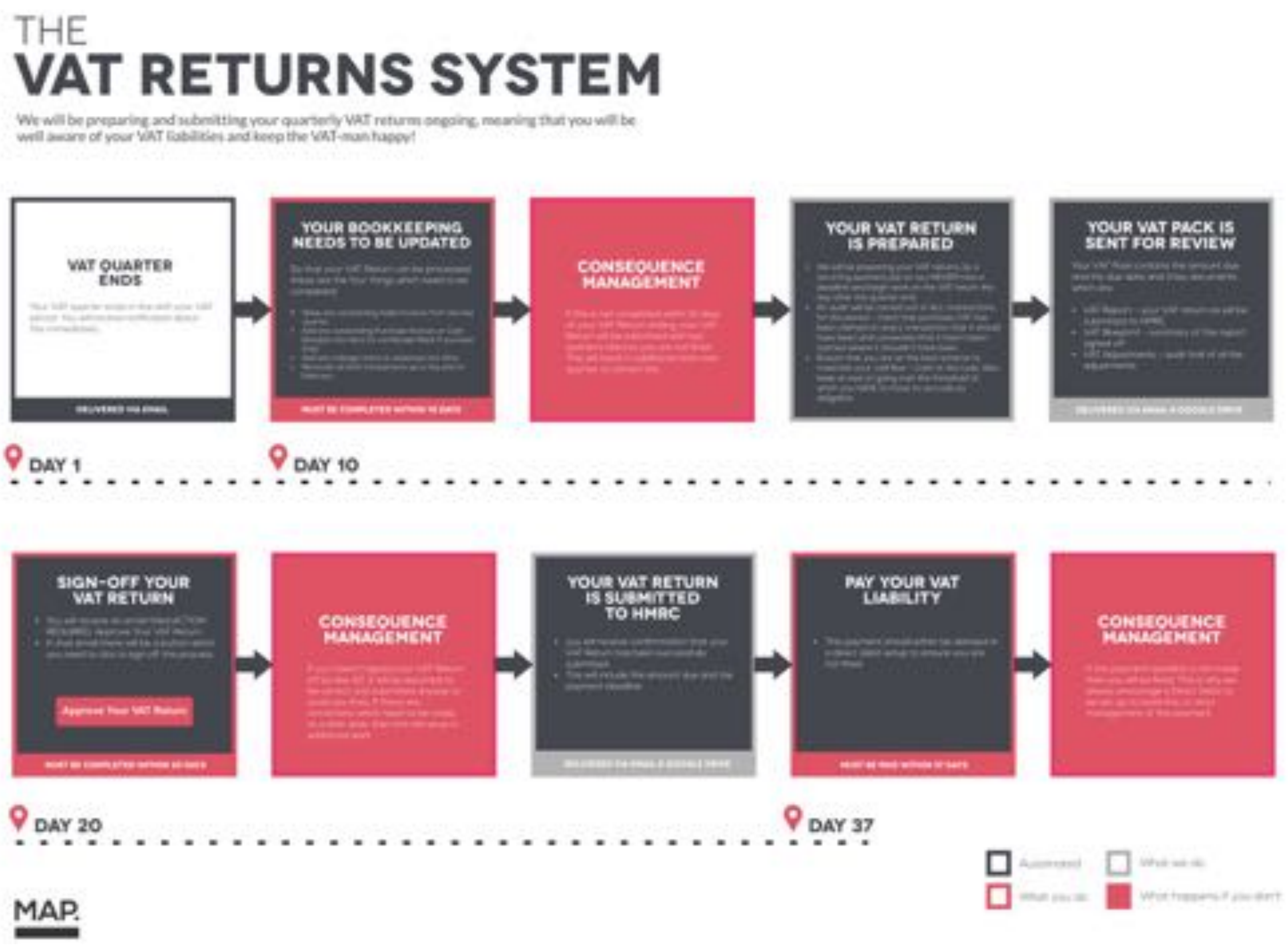
Fee changes - when and why?

People - who do they deal with for what?

Systems - which ones do you/they use & not use? How do they use them?

Meetings - when & how often & how much?

Responsibilities - what do you do, what do they do?


THE
VAT RETURNS SYSTEM
We will be preparing and submitting your quarterly VAT returns ongoing, meaning that you will be well aware of your VAT liabilities and keep the VAT-man happy!
VAT QUARTER ENDS
YOUR BOOKKEEPING NEEDS TO BE UPDATED
CONSEQUENCE MANAGEMENT
YOUR VAT RETURN IS PREPARED
YOUR VAT PACK IS SENT FOR REVIEW
DAY 1
DAY 10
SIGN-OFF YOUR VAT RETURN
CONSEQUENCE MANAGEMENT
YOUR VAT RETURN IS SUBMITTED TO HMRC
PAY YOUR VAT LIABILITY
CONSEQUENCE MANAGEMENT
DAY 20
DAY 37
MAP.

“

Onboarding is the process of setting and communicating good boundaries and being clear about the consequences if those boundaries are not kept so you never have a bad client again.


PF
Marketing Map
Training
Brand
Website
Plan
Outsourced marketing
Lead generation
Content Marketer
Social Marketer
Mastery
Brand Explorer
Brand Mapper
Brand Builder
Website Explorer
Website project
Plan workshop
Action list
Co-pilot & tracking
Marketing credits
Website management
Daily social
SEO
Ads
Social

Jonathan’s story


TRUST ME I'M AN
ACCOUNTANT

Initial onboarding (6 months)

Before day one: Payment

Month 1: Setup & admin (payroll, systems)

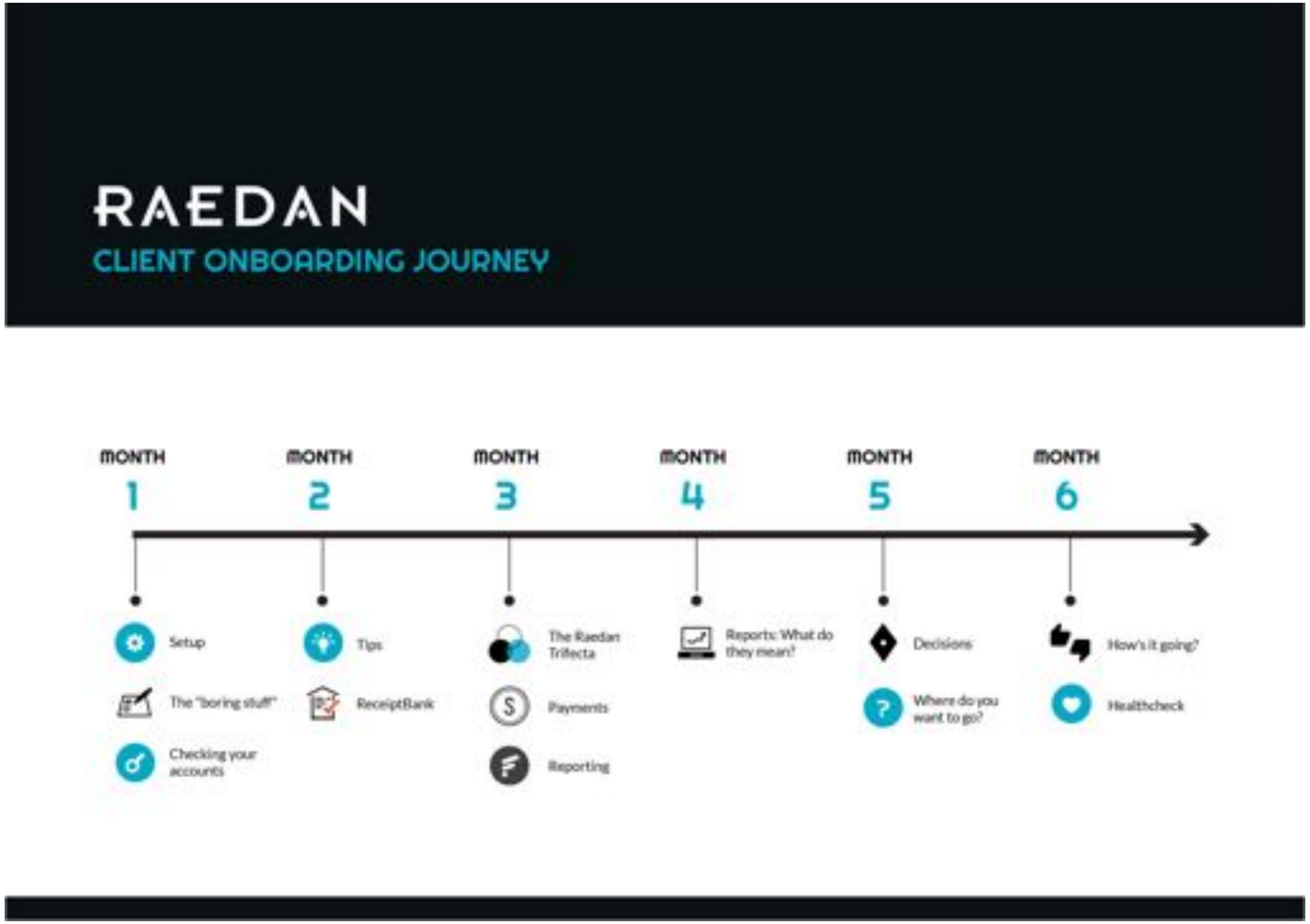
Month 2: Catchup & conversion (training, expense apps)

Month 3: Apps (including payment apps)

Month 4: Reporting (analytics, goals)

Month 5: Decisions & check in

Month 6: Health check (review goals)


RAEDAN
CLIENT ONBOARDING JOURNEY
MONTH 1
Setup
The "boring stuff"
Checking your accounts
MONTH 2
Tips
ReceiptBank
MONTH 3
The Raedan Trifecta
Payments
Reporting
MONTH 4
Reports: What do they mean?
MONTH 5
Decisions
Where do you want to go?
MONTH 6
How's it going?
Healthcheck

The onboarding basics

- Onboarding page
- Video
- Fact find form
- Thank you page
- Video
- Email reminders
- …continue!

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Your steps to create your onboarding journey

Step 1
Email
Directing to Fact Find

Step 2
Landing page
Build webpage

Step 3
Form
Add Fact Find to webpage

Step 4
Video
Add to emails & landing page

Step 5
Webpage
Build thank you page

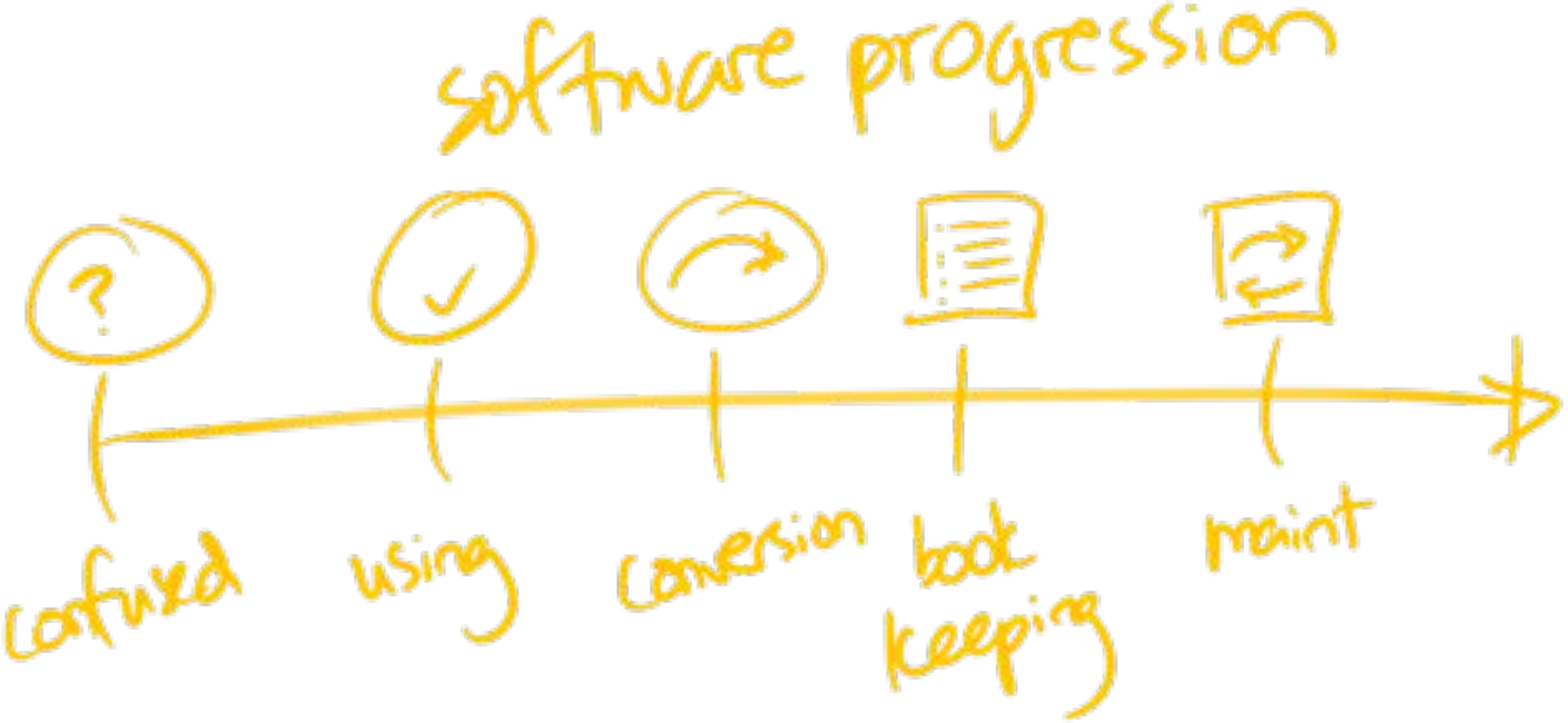
Step 6
Email
Fact Find thank you

Step 7
Onboarding continues!
Keep crafting your client's journey

Both machine and human together


ATTEND THE KICKSTART
DAY 1
DAY 2
CONFIGURE YOUR LINE ITEMS
IMPORT YOUR LETTER OF ENGAGEMENT
DAY 3
DAY 7
HAVE YOUR STRATEGY CALL
ARRANGE YOUR FIRST FEE REVIEW
DAY 10
DAY 21
HAVE YOUR PROGRESS CALL
GET YOUR FIRST PROPOSAL ACCEPTED
DAY 30

Software progression



QuickBooks onboarding

Switch your Clients from Spreadsheets to Online Software

A variety of assets to promote the benefits of cloud accounting software.

10

View campaign

Showcasing Yourself as Business Advisor

A variety of assets to promote the additional services that you can offer as their Accountant.

11

View campaign

Client Onboarding

A variety of assets promoting the key actions all of your clients should be taking to get started with QuickBooks.

10

View campaign

Client progression


de Jong Phillips
The Agency Journey
Freelance
Manages agency with no staff
Turnover: less than £100k
Start-up
Hires staff and currently have a team of 1-4 people
Turnover: £100k to £400k
Scale-up
Attracts and retains staff and have a team of 5-15 people.
Turnover: £400k to £1.5k
Established
Clear team structure with an element of functional reporting.
Turnover: £1.5m to £10m
Questions you need to ask yourself along the way:
Do you want this to be the start of something bigger?
Do you have the time and money you need to grow your business in the way you want?
Have you prepared to not just to achieve growth but profitable growth?
Is the infrastructure of your business holding you back from something even greater?
How we can help
Certainty that you are doing what you need to when you need to.
Save time, visibility of your future cashflow, confidence for future investments needed to grow.
Have more control (less overwhelmed) and a solid plan, ongoing support & insight to better understand what to do to grow.
Confidence to step away from managing day-to-day business and into leadership role while the business thrives.

PF

Your steps to create your onboarding journey

Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7
Email	**Landing page**	**Form**	**Video**	**Webpage**	**Email**	**Onboarding continues!**
Directing to Fact Find	Build webpage	Add Fact Find to webpage	Add to emails & landing page	Build thank you page	Fact Find thank you	Keep crafting your client's journey

wearepf.com/onboarding

Onboarding is the process of setting and communicating good boundaries and being clear about the consequences if those boundaries are not kept so you never have a bad client again.


Harry Potter

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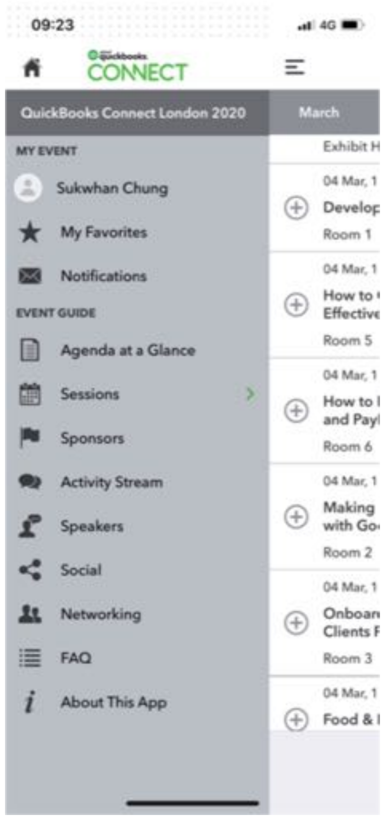

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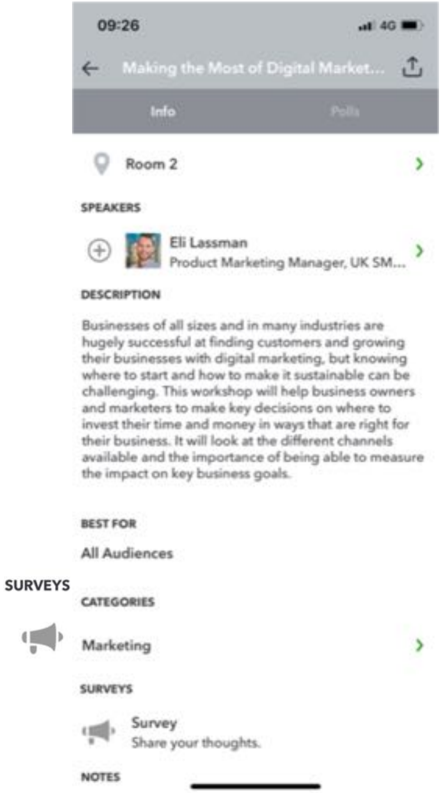

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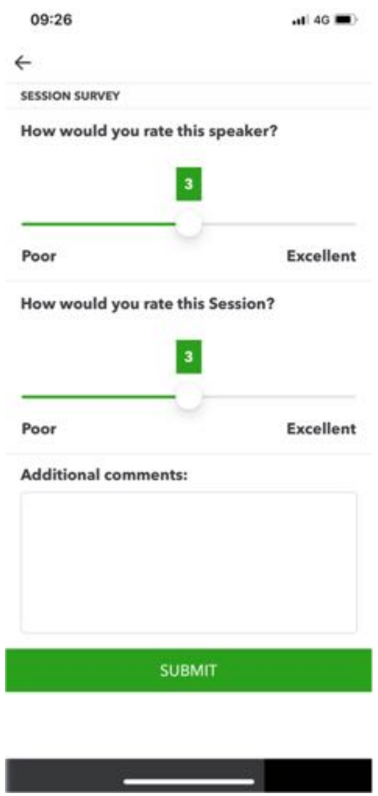

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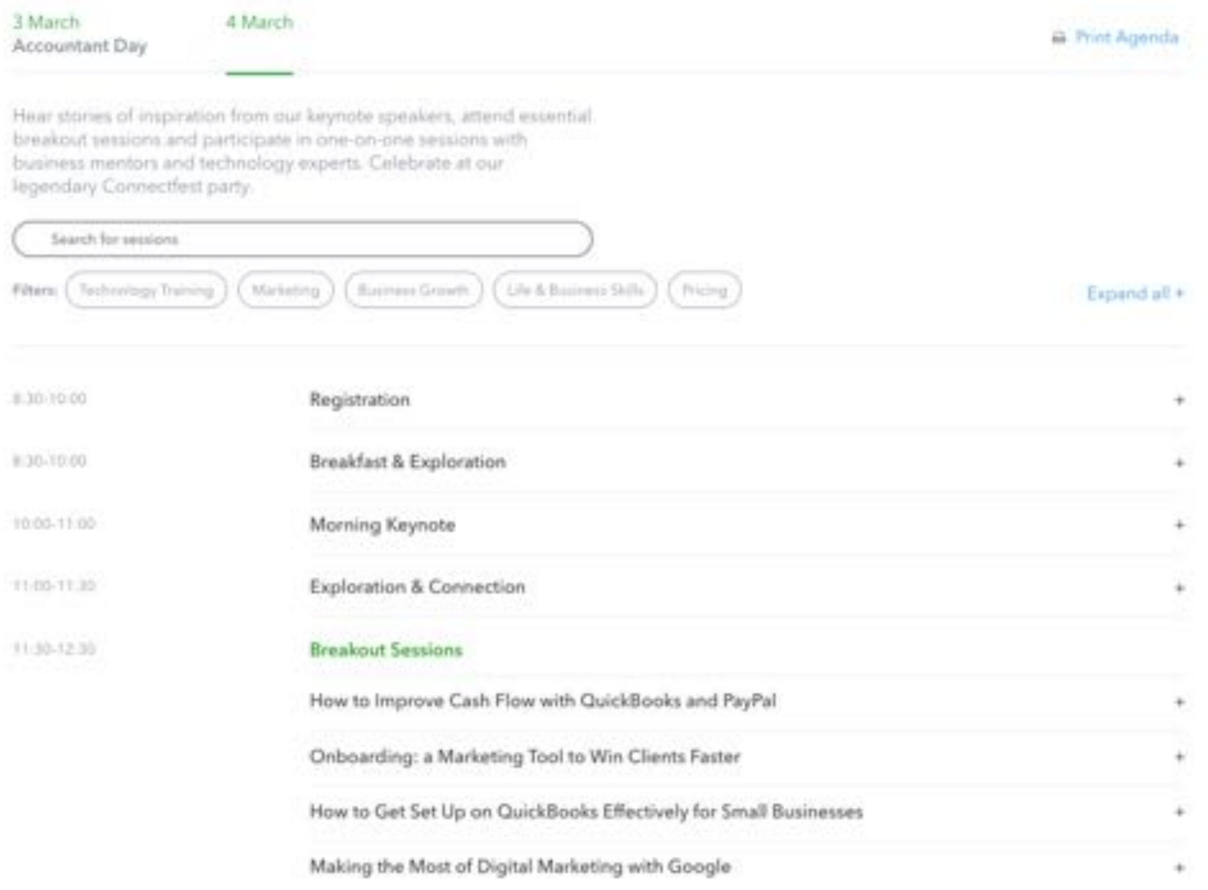

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OWN THE FUTURE