Client Onboarding Playbook

Start every relationship off right.

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Start Every Relationship Off Right

Simple systems to onboard faster, serve better, and scale with ease.

First impressions matter, especially when you're handling someone's books. This playbook is here to help you start every client relationship with confidence, structure, and clarity.

A smooth onboarding process doesn't just make your life easier, it reassures your client that they're in capable hands. When your systems feel organized and thoughtful, clients are more likely to trust you, stick with you, and respect your boundaries and processes.

Inside, you'll find a repeatable checklist that keeps everything on track while also making your client feel supported, informed, and excited to work with you.

You got this! ✨✨✨

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Co-Founders | CPAs

What's Inside

*Below are **5 steps** to a seamless onboard*

Pre-Onboarding

Lay the foundation before you officially begin work.

□ Intro Call (30–45 min)

Get to know your potential client and how they work.
Ask yourself:

- Are my services a good fit for what they need?
- Can they share documents digitally and adapt to my systems?
- Do they understand the value of my pricing?

💡 **Pro Tip:** Take notes to tailor your proposal and flag any potential red flags.

□ Send NDA (or confidentiality agreement)

- Before accessing any systems or files, send a basic confidentiality agreement.
- Use tools like DocuSign and LawDepot to make it easy.

□ Review Their Books

Ask for temporary access or backup. Look for:

- Are the books up to date?
- Are bank accounts reconciled?
- Is cleanup work needed?

□ Send Quote + Engagement Letter

- Outline both recurring and one-time work (like catch-up or cleanup).
- Be clear on deliverables, timelines, and scope.
- Send through your e-signing tool and follow up if unsigned after 72 hours.

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Streamline Inputs

Once they've signed, it's go time!

□ Create a Client Profile in Your Task Manager

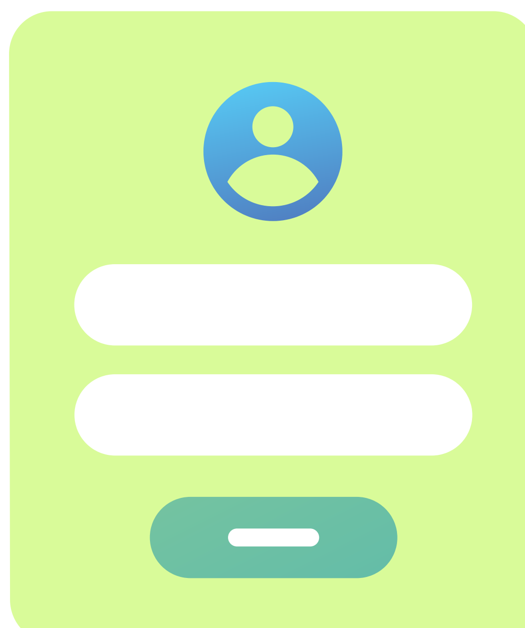
Include:

- Main contact + email + phone
- Communication preferences
- Reporting needs
- Any other key team members or contacts (payroll, tax, etc.)
- Notes from your initial call

💡 **Pro Tip:** We have a "Client Overview" project in Asana and give each client their own section for key info, preferences and communication logs.

□ Add Recurring Tasks

- Add each service with frequency and due dates. (monthly bookkeeping, payroll, filings, etc.)
- Assign to yourself or team. Use a tag like **ClientName** to keep things organized.



□ Secure Logins

Use a password manager like 1Password or LastPass. These tools let you store all your logins in one place, share access securely with your team, and never worry about losing a password again.

It's way more secure than spreadsheets or sticky notes and makes onboarding team members (or scaling your firm) a whole lot easier.

Streamline Inputs

☐ Create a Client Submission System

This is how your client will send you documents and info on an ongoing basis — receipts, employee changes, questions, etc.

💡 **Pro Tip:** Keep it simple. Your client should always know how to send something to you and what to include.

Submission options include:

- Jotform (we love building custom apps with buttons like "Submit a Receipt" or "Add an Employee")
- Forms like Google and Notion
- Direct email (not recommended long-term)

☐ Set Up Document Storage (Internal Use)

This is where you store and organize the documents once you receive them.

Choose a method that works for your firm:

- Hubdoc or Dext (great for receipt management)
- Folder inside Google Drive, Sharepoint, Dropbox or alike
- Attaching files directly inside the client's accounting software

💡 **Pro Tip:** Make sure your process is consistent so your whole team knows exactly where to find what they need.

☐ Set Up a Shared Folder

Create a folder labeled something like **Shared Drive - [Client Name]** using Google Drive, Dropbox, or something similar.

Inside, create subfolders for shared information:

- Receipts, Filings, Reports, Payroll (if needed)

💡 **Pro Tip:** Use your kickoff call to walk the client through this shared folder. It helps them feel confident knowing exactly where to find key info, like a filed return or payroll summary and shows that everything's being handled with care and clarity from day one.

Client Communication

Let the client know exactly what you need and make them feel supported.

☐ Request Key Info + Access

Business Info

- Incorporation docs
- Last year's tax return
- Prior financial package
  - Financial statements
  - Adjusting journal entries
  - Trial balance

Access & Logins

- View-only access to bank and credit cards
- Tax filing system or government portal
- Payroll platform login
- POS, time tracking, or other key tools
- Invite to their accounting software with full accountant access

☐ Send a Welcome Email

Keep it short and clear, but also friendly and warm. Include:

- A clear list of what you need from the client
- A deadline for delivery (e.g. within 5 business days or 24 hours before the kickoff call)
- Instructions for uploading documents
- A link or instructions to book their kickoff call with you

💡 **Pro Tip: Try this AI prompt**

"Write a friendly onboarding email for a new bookkeeping client. Include this list of items and logins I need [enter list], a link to their shared folder, a Calendly link to book a kickoff call, and a deadline of 5 days. Make it clear, helpful, and upbeat."

Kickoff Call (30 Minutes)

Walk through your systems, build trust, and set expectations.

This call is more than logistics. It's your chance to build confidence and make them feel great about working with you!

- **Review what they've submitted**
- **Show how they'll submit things going forward (form, app, email, shared folder)**
- **Walk through where they can find key docs (e.g. "your payroll reports will be in this folder")**
- **Reiterate what services you're providing, and when they'll be completed**
- **Explain how and when you'll send reports**
- **Schedule your first official meeting (monthly, quarterly)**
- **Clarify how to contact you, what your response time is, and how they can book a call.**

💡 **Pro Tip:** Send a follow-up email after the call summarizing everything, this keeps the client (and you!) on the same page.

Post-Onboarding Check-In

Check in once they've been with you a week or two.

New message

To... **newclient@email.com**

Subject... **Checking In!**

☐ **Follow up 1–2 weeks after the kickoff call**

- Ask if they're comfortable using your systems
- Confirm everything is working (shared folder, receipt submission, etc.)
- Invite feedback to help you refine your onboarding process

SEND

💡 **Pro Tip: Try this AI prompt**
"Write a follow-up email to a bookkeeping client 2 weeks after onboarding. Confirm everything is working, ask if they have questions, and thank them again for trusting us."

Bonus

Common Roadblocks (and How to Handle Them)

Issue	Fix
Client delays	Set a clear deadline in your checklist email and follow up with a gentle reminder
Scope creep	Revisit your signed engagement letter and re-confirm what's included
Tech overwhelm	Record short Loom videos to walk them through your systems step-by-step. You can reuse these for common client questions.
Client doesn't use your tools (yet)	Don't stress! Meet them where they're at. Reassure them that your systems are designed to make their life easier, and that you'll guide them through every step.
Resistance to change	Remember: they hired you to help. Avoid overhauling everything on day one. Start by showing how your systems will save them time and stress, then ease them into improvements as trust builds.

Tips for Success

Brand It
A branded welcome doc or custom submission app makes you look polished and prepared.

Automate What You Can
Simple automations can connect your forms, task manager, and accounting tools to save time and reduce errors.

Refine as You Grow
After every 2–3 clients, tweak this process. Add what worked, cut what didn’t. It’s okay to evolve.