fibrecrm Heart OF THE PRACTI

Client Onboarding Complete End-to-End Process Map

Ditch all those spreadsheets, disjointed apps, clunky processes and lack of overall visibility

Invest in a complete client onboarding solution for accountancy firms

Client onboarding process map



Secure Client Data Capture

- Create pre-defined data
- capture forms
- \cdot One click to send form to client
- Client uploads data & documents
- $\cdot \; \mathsf{GDPR}\text{-}\mathsf{compliant}$
- Approvals, reminders & alerts

Professional Clearance

Automated letters to previous accountant
One-click send from client record



One system to manage your complete onboarding process
Complete visibility of the process at every stage
Cut time to onboard in half

Time savings with a specialist onboarding solution for accountants

	Area	Time Saved*
\oslash	Generating proposal and sending for e-sign	30min
\oslash	Generating engagement letter and sending for e-sign	30min
\oslash	Entering data from companies House	10min
\oslash	Chasing client for missing information	10min
\oslash	Manaing KYC due diligence and risk assessment	20min
\oslash	Running AML checks	4min
\oslash	Chasing and alerting staff	10min
\oslash	Collating files, risks, AML, LOE - archiving for audit purposes	15min
\oslash	Creating new client in practice management	7min
\oslash	Sending professional clearance letter	3min
\oslash	Sending satisfaction survey and record results	5min
\oslash	Adding client to various marketing lists	3min
\oslash	Annual risk assessment	10min
157 minutes saved per client		

How many clients did you onboard last year?

*based on an average of time saved across FibreCRM customers

Benefits of an effective onboarding system

- Increased capacity to take-on more clients using existing resources.
- Time freed up for more billable work or more time to spend on generating value for clients and the firm.
- One place to go for everything. Onboarding data no longer located in disparate systems.
- Makes lives easier for everyone in the firm.
- Shows your new customers they have chosen a digitally astute firm. Service is fast, responsive and handled securely.

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