

**fibrecrm**

HEART  
OF THE  
PRACTICE

# 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



# Time savings with a specialist onboarding solution for accountants

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

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.