

How to Save Precious Time Onboarding New Clients

You might have routines and systems to help a new employee settle in, such as payroll forms and training manuals. You might also have some procedures set up for when you start doing business with new vendors, such as asking them for their tax ID paperwork and having them submit invoices to your standards. But what about *onboarding* new clients? Most entrepreneurs don't think about systematizing that process.

You will save a ton of time if you stop and put some systems in place to help you and your new client get off to an efficient start. The payoff can be extremely high. If you save a half hour per client and you have 100 new clients a year, then you just saved 50 hours a year, or an hour a week.

Here are a few tips to get you thinking about where you might be able to streamline your new "New Client Acquisition Process."

First the Paperwork

What forms do you need from every client? These might include:

- An engagement letter or contract that describes the scope of the work to be done.
- Billing information, which might include a credit card on file and the process they want used to submit and approve invoices.
- How the client found out about you for marketing tracking purposes.

You can further systematize this by having a standard engagement letter, a form each client fills out, and/or a standard pre-written email (forever saved in your drafts folder of your email program for easy access).

The Good Old Days

Way before computers and the internet, all types of businesses used to run credit checks on new customers before opening their accounts. That might not be a bad idea to bring back! If so, you'll need a form for that so that your clients can provide you with the information you need to run a credit check. Either that or provide them the ability to prepay their account.

Getting Started

Make a list of items you need from your clients to get started. This will vary depending on what industry you serve. Here are some common items to get you started:

- Contact information include staff names, titles, phone numbers, and email addresses
- Account names, user IDs and passwords

- Description of their problem if it's repair-related
- Hardware and software information if it's a computer-related service
- Any documents you need to complete your project
- Insurance information
- Licenses

Once you have your list, you can create a form asking for all of the information you need from every client. This will save you tons of time if you are asking for these things piecemeal now.

Instructions

Do you find yourself repeating the same instructions over and over again to each new client? Write your spiel down or better yet, make a recording so your client can listen in at their convenience and play it over and over again if they need to.

Here are some common implementations of this one:

- Photography studio owners can write down how clients can prepare for their portrait and what to wear.
- Grocery stores can provide recipes for items in their deli.
- Plant nurseries can have instructions on how to re-pot plants.
- Plumbers can provide instructions for how to turn off the water.
- Restaurants can offer menus that disclose ingredients and calories for those who are sensitive or on diets.
- Office supply stores can make a chart of how different products compare.
- Web hosting companies can have screen-capture videos made on how to set up email accounts.

You'll save tons of time with this one. What can you think of to save yourself time onboarding clients?

Systems

There's no doubt you'll need to enter some information into your sales, order, accounting, or project system in order to set up your new client. If there's any way your client can do this directly, then you will have saved yourself a step. Take a look at where you have duplicate data entry and explore ways to automate it or have the client enter the information directly. We can help you with some ideas if you need help in this area.

Welcome Packet

Is your business the type that could send your client a welcome packet of goodies? If so, shower your new client with bonuses and goodies so they'll have a positive first impression that will last a long time. These items will include anything that saves your client time and money, and will NOT be a bunch of promotional items with your logo on it. (If it has your logo on it, it's not a gift; it's an ad.)

These items might be checklists, reports, tips, cheat sheets, candy, flowers, liquor (if your license allows it), a thank you note, a stuffed animal, and/or anything else that is a traditional gift.

Take a look at all the steps you go through to onboard your client, and see where you can streamline your systems so that both you and the client will save time. You'll also look amazingly organized to the client, which is a good thing!