

# STEPS TO NEW CLIENT 5 JOURNEY ROADMAP

IN OUR EFFORT TO PROVIDE EXCEPTIONAL CLIENT SERVICES, WE WANT TO ENSURE YOUR EXPECTATIONS OF OUR SERVICES ARE DISCUSSED, AGREED UPON AND MET. TO ACHIEVE THIS GOAL, WE HAVE STREAMLINED OUR ON-BOARDING PROCESS IN FIVE EASY STEPS.

## DISCOVERY PHASE

# 1

This is an opportunity for us to get to know you and your business.

We will get into a high level discussion about your accounting processes such as invoicing, payroll, expense tracking and ensure we address all your tax compliance requirements. We will suggest a number of apps that may help automate or streamline some of the mundane accounting functions.

## CONSULTATION PHASE

# 2

Once we have completed our Discovery Phase, we walk you through our structured packages or craft one to meet your needs. We then present our proposal which contains our scope of work for your review and approval.

We then proceed to the On-Boarding Phase to ensure a smooth and seamless transition to our services.

## ON-BOARDING PHASE

# 3

Here's where things really start to get really exciting ! We flip the switch by first wrapping the admin side of things, explaining how we deliver our services and support and getting you set up as best fit your requirements.

We ensure you have a good grasp of the systems and apps you will be using and educate you how to maintain your bookkeeping after you are all set up.

## CHECK UP PHASE

# 4

This can be the most time consuming part of the process but also the most satisfying and rewarding.

Before transitioning to cloud accounting, we will perform a health check to ensure your financials are accurate and up to date. We will identify and record any existing issues, provide recommendations and formulate a plan for the Check Up Phase.

## MAINTENANCE PHASE

# 5

Here is where we begin the monthly ongoing bookkeeping services that we established in our proposal.

Congratulations! You are now set up with a new hassle free bookkeeping system designed to help you manage your business more effectively.