LEAD ONBOARDING PIPELINE

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CREATE A JOB TEMPLATE

Template Name: NEW LEAD

STAGE 1: LEAD KICK-OFF

1.SEND MESSAGE: LD-CLIENT APPLICATION

Template name: LD - Client application sent

Subject: Thank you for your interest in working together!

Hello,

Thank you for your interest in working with my firm. Before we dive in, I'd like to learn more about you and your business so we determine how we can best support you. Inside our client portal, you will have received a message and a brief application.

Please complete this application and once I review it, we can set up a call to discuss next steps.

I appreciate your time!

(Your name here)

2.SEND EMAIL: LD- CLIENT APPLICATION HAS BEEN SENT

Template name: LD - Client application sent

Subject: Thank you for your interest in working together!

Hello,

Thank you for your interest in working together! Before we dive in, I'd like to learn more about you and your business so we determine how we can best support you. Inside our client portal, you will have received a message and a brief application.

Please complete this application and once I review it, we can set up a call to discuss next steps.

I appreciate your time!

(Your Name)

3.SEND ORGANIZER: NEW LEAD APPLICATION

*The following questions are suggestions only. Your organizers should reflect the key information YOU need in your business. Please ensure you are customizing this for what works for you and your business.

Questions to add:

- Name
- Email
- Phone
- Company name (if applicable)

If business,

- What is your service industry: beauty, carpentry, cleaning/janitorial, coach & consulting, construction/home services, creative services, education services, event planning, financial services, medical/health, network marketing/direct sales, personal training/physical fitness, real estate, ecommerce, restaurant, other
- Business Type:

LLC, S-corp, sole proprietor, C-Corp, LLP

- What service are you interested in? book clean-up service, bookkeeping service, tax prep, payroll services, quarterly cleanup.
- If bookkeeping, what are your bookkeeping needs?
- Have you worked with a bookkeeper before?
- How involved are you in your current bk process?
- Describe your business, what do you do?
- How many years in business?
- Size of your business? Just me, partnership, 1-2 employees, 3-15 employees, More than 15
- What is your monthly recurring income?
- How many bank accounts do you have?
- How many credit cards do you have
- Do you have any outstanding loans
- Do you have inventory
- Do you have staff/payroll
- Do you have independent contractors?
- All types:
- Will this be your 1st time working with an Accountant / Bookkeeping Service?
- What are your top three areas that you want to improve in your accounting?
- Is there anything else that I should know about you and your business?
- Why are you considering working with us at this time?
- How did you hear about us? FB, IG, Google, Referral
- Please name your referral so we can thank them.

4.ADD TAG: NEW LEAD

STAGE 2: CLIENT APPLICATION

1.SEND MESSAGE: LD-APPLICATION RECEIVED

Template Name: LD- Application Received
Subject: Your application has been received!

Thank you for completing the application. I will review your responses and will get back to you shortly!

2.SEND EMAIL: LD- YOUR APPLICATION HAS BEEN RECEIVED

Template Name: LD - Your application has been received
Subject: Your application has been received!

Hello [FIRST_NAME]!

Thank you for submitting your client application. I will be reviewing your answers in detail, and will respond back to you shortly.

In the meantime, please let me know if you have any questions.

Looking forward to connecting!

[Your Name]

3.TASK: LD- REVIEW APPLICATION

Subtask: Review application & send follow-up email as described
Description:
Review the received organizer and determine if you want to proceed with this lead. If yes, complete this task to move to next stage and schedule an appointment.
If no, send the "LD- Not a fit" email.

If yes, move forward to next stage.

a.EMAIL TEMPLATE: LD-NOT A FIT

Template Name: LD- Not a Fit
Subject: Thank you for your application

Hello [FIRST_NAME],

Thank you for submitting your application, I greatly appreciate your time.

We have reviewed your application, and at this time, I don't believe that I am able to support your needs. [If you have a referral, insert that here]

I wish you all the best, and appreciate your interest in working with us.

Thank you again and best of luck!

[Your Name]

STAGE 3: DISCOVERY CALL

1.SEND EMAIL: LD- SCHEDULE A CALL

Template Name: LD- Schedule a Call
Subject: Let's chat!

Hi [FIRST_NAME],

Thank you for your interest in working together. I would love to schedule a brief call with you to discuss how I can support your needs.

Please use the link below to book a quick call to discuss further.

Book your call here (insert link)

I'm looking forward to learning more about you, and how we can potentially work together!

[Your Name]

2.TASK: LD- CONFIRM CALL BOOKED

Description: Confirm aptmt has been booked

STAGE 4: SEND PROPOSAL

1.TASK: LD-DISCOVERY CALL COMPLETE

2.TASK: LD- UPDATE & SEND PROPOSAL (IF NEEDED)

Description: Update proposal template or custom field/message. [Note: many accountants choose to bypass the proposal and move straight to the EL. If so, just update this stage to "Call Complete" and skip this task.]

*This is where you have multiple options

1. You can utilize the TaxDome proposal solution & request a signature OR
2. You can utilize a custom field to include a link to an existing document, OR
3. Update the below message template with proposal details.

Template Name: LD- Proposal
Subject: Your Proposal is Ready!
Hello,

Your Proposal is complete. Please review the following details and confirm if you would like to move forward by checking the box under tasks.

[This is where you can either manually add the details and send the message, or add in a custom field. See the video training for instructions on this process.]

I look forward to hearing from you.

[Your Name]

Add client task to message:
Check this box if you would like to move forward and work together.

3.TASK- LD- UPDATE RELEVANT TAGS

Description:
Lead- Non-Tax Prep (*Always include this for any non-tax prep clients. If client is Tax Prep AND other services, still include this tag)
Lead - BK (Bookkeeping Lead)
Lead- TAX PREP (Tax Prep Lead)
Lead- Other (Other services performance lead)
LEAD: TAX PLANNING (Tax Planning Lead)

STAGE 5: PROPOSAL ACCEPTED

2.TASK: LD- PROPOSAL ACCEPTED OR REJECTED

Description: Review client responses and follow-up, or move to the next stage accordingly. If rejected, archive the job.

STAGE 6: SEND CONTRACT*

*Set conditional stage. This should only apply for leads tagged with 'non-tax prep.' If clients are tagged with both 'non-tax prep' AND 'tax prep' then the client will receive a contract now, and then an engagement letter through the Tax Prep pipeline.

1.TASK: LD-UPDATE CONTRACT TERMS & SEND(Non-Tax Prep)*

*Tax Prep clients will receive their engagement letter inside the Tax Prep pipeline. See video for explanation. We recommend consulting with a lawyer to ensure you have the appropriate terms and conditions. You can use TaxDome's templates as a starting point. Set the conditions on this task to only apply to those tags that are NOT Tax Prep related. See video for details.

2.TASK: LD-CREATE AND SEND DEPOSIT INVOICE (NON-TAX PREP)

*Assuming this amount is non-standard. If it is standard, you can create a flat amount invoice and set the automation to SEND INVOICE and select which invoice would be sent.

STAGE 7: CLIENT WELCOME

1.UPDATE TAGS: ADD NEW CLIENT, REMOVE LEAD

2.SEND EMAIL: LD-WELCOME & NEXT STEPS (NON-TAX PREP)

Template Name: LD- Welcome & Next Steps email (non-Tax Prep)
Subject: Welcome to (your firm name)
Email:
Hi [FIRST_NAME],

I'm excited to work together!

Here's what happens next:

- Your contract and invoice can be found inside your client portal.

- Please complete both of those before moving forward. I will also be sending you a detailed questionnaire with additional questions to get you fully onboarded.

As you have already seen, we use a program called TaxDome to keep all your information secure. We will use this program for our communication, document storage, questions, etc. in order to keep all your information safe and secure.

Please don't hesitate to ask questions on how to use the program, or reach out to me with additional questions you may have. You may also reach out via email to [your email] however please keep in mind the email is not secure, so sensitive questions should remain in your portal.

NEXT STEPS:

1. Login to your secure portal here: [your portal link] Please bookmark this link!
2. Complete the contract
3. Pay your deposit invoice
4. Complete the onboarding questionnaire

Need help with your portal? Here are 2 videos to walk you through how to use it on your desktop or the app on your phone:

Mobile App overview
Video link

How to Install the TaxDome Client Portal on your mobile device
Video link

Please don't hesitate to reach out with any questions!

[Your Name]

3.SEND EMAIL: LD-WELCOME & NEXT STEPS (TAX PREP ONLY)

Template Name: LD- Welcome & Next Steps (tax prep only)
Subject: Welcome to (your firm name)

Hi [FIRST_NAME],

I'm excited to work together!

Here's what happens next:

As we get closer to kicking off your tax preparation, we will prepare your Engagement Letter and an invoice, and will upload these inside your client portal (on the Home Page view under your To-Do list.)

Please complete both of those, as well as the detailed questionnaire once received. You will receive a notification once these have been sent to you.

As you have already seen, we use a program called TaxDome to keep all your information secure. We will use this program for our communication, document storage, questions, etc. in order to keep all your information safe and secure.

Please don't hesitate to ask questions on how to use the program, or reach out to me with additional questions you may have. You may also reach out via email to [your email] however please keep in mind the email is not secure, so sensitive questions should remain in your portal.

NEXT STEPS:

1. Login to your secure portal here: [your portal link] Please bookmark this link!

As we kick-off, you will then:

1. Complete the engagement letter
2. Pay your invoice
3. Complete the questionnaire

Need help with your portal? Here are 2 videos to walk you through how to use it on your desktop or the app on your phone:

Mobile App overview
Video link

How to uInstall the TaxDome Client Portal on your mobile device
Video link

Please don't hesitate to reach out with any questions!

[Your Name]

4.SEND ORGANIZER: NEW CLIENT ORGANIZER (NON-TAX PREP)*

*We recommend starting with TaxDome's New Client Organizer and then changing it, adding questions and removing to fit YOUR business. Because this process is so specific to YOU, we want to make sure it will work for you. See the training video for Lead Onboarding for more.

STAGE 8: COMPLETE

1.TASK: LD-SET UP RECURRING INVOICES IF APPLICABLE

2.TASK: LD- ADD JOBS TO PIPELINE(S)

3.TASK: LD- ARCHIVE JOB