

WEBINAR

Start Smarter:

How Top Firms Onboard Clients in Half the Time

TUESDAY, NOVEMBER 4TH AT 3PM ET

*1 CPE Credit



Speaker: KC Brothers,
Director of Product Marketing,
Canopy



Speaker: Liz Scott,
CEO, Accounting Lifeline





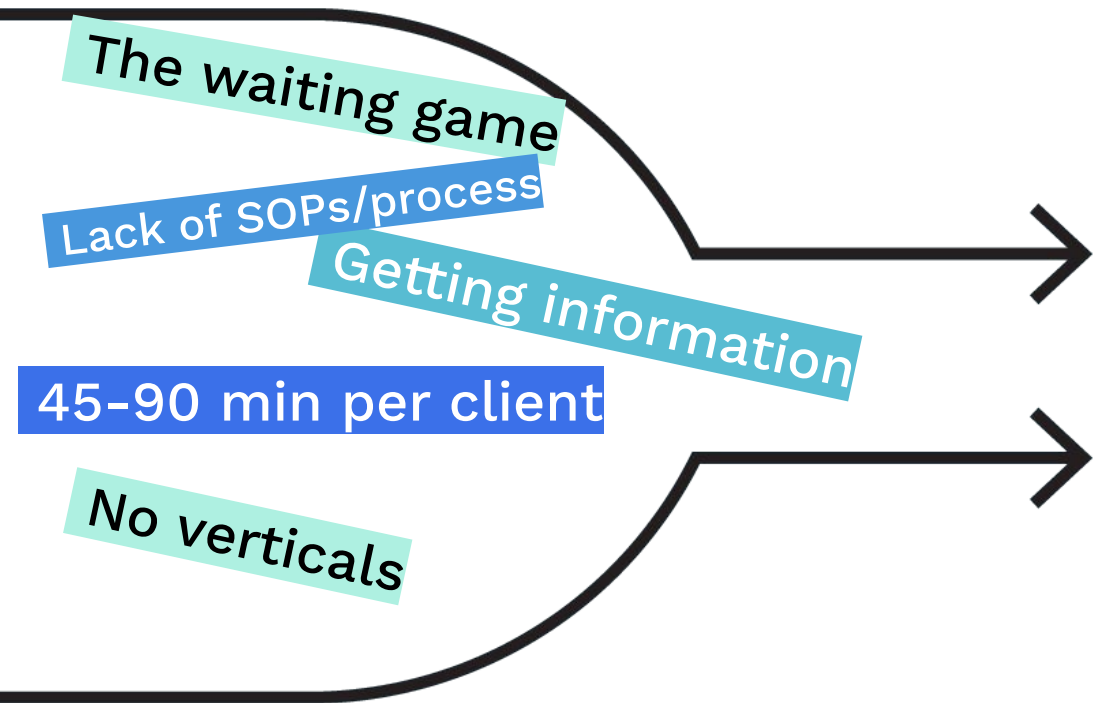
Liz Scott

Accounting Technology Implementer



KC Brothers

Director of Product Marketing



THE

Onboarding

Bottleneck



What top firms do differently




1. Smart, structured intake
2. Automated follow-ups
3. Polished, fast engagements




SMARTER INTAKE:


Build Once



Verticals

A light gray rounded rectangle containing three circular icons representing people in teal, blue, and dark blue. Below the icons, the word "Verticals" is written in a bold, black, sans-serif font.

SOPs & templates

A light gray rounded rectangle containing an icon of a checklist with three items, the first two checked. Below the icon, the text "SOPs & templates" is written in a bold, black, sans-serif font.

AI for customization

A light gray rounded rectangle containing an icon of a hand holding a smartphone with a lightning bolt symbol. Below the icon, the text "AI for customization" is written in a bold, black, sans-serif font.



Canopy Demo





Let your system do the chasing

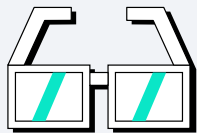


- Hidden cost of manual processes
- Perception of reminders
- Get to & stay in deep work

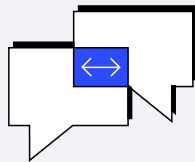


Engagements that work

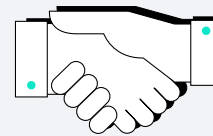
(and wow)



Perception
is key



Client experience
world



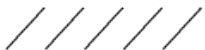
Stick to
boundaries





Real-World Wins

- Save 50 min on intake
- Take leave or vacation
- Sell or acquire firms





**But
where
do you**



START

- 1.** Audit your current intake
- 2.** Create/update SOP
- 3.** Add automation & AI



Wrap-Up

1

Smarter intake >

2

Fewer follow-ups >

3

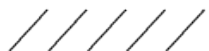
Faster engagements >

4

In-scope work >

5

More revenue & less brain drain





Q & A



**Thank
you!**