How to Handle Client Onboarding

TOOLS:

BASIC INFORMATION

CONTACT CARD

CLIENT SINCE DATE

CONTACT DETAILS

USER DEFINED FIELDS

KNOW YOUR CLIENT

Observation: Congratulations! You've just added a new client to your book of business. There is a lot to be done to get your client up and going with your practice. Redtail provides a number of tools to make this transition as efficient as possible.

Directions:

1. Change the contact Status to "Active Client."
   CONTACT RECORD > CONTACT DETAILS > EDIT > STATUS
2. Add and label contact information to designate primary and preferred methods of communication.
   CONTACT RECORD > CONTACT CARD > EDIT
3. Enter Client Since Date.
   CONTACT RECORD > CONTACT DETAILS > EDIT > CLIENT SINCE DATE
4. Enter essential information not collected during discovery process TAX ID, DOB, etc.
   CONTACT RECORD > CONTACT DETAILS > EDIT
5. Add User Defined fields for contact's preferred meeting time, and other information essential to the client relationship.
   CONTACT RECORD > UDFS > ADD
6. Add the contact's family members and link through the family page.
   CONTACT RECORD > CREATE A NEW FAMILY > ADD
7. Collect and input information to the Know Your Client section such as CPA, Attorney, Driver's license information, etc.
   CONTACT RECORD > KNOW YOUR CLIENT > EDIT

Result: You only get one chance to make a first impression. A smooth onboarding process is essential for instilling trust and confidence in your client's mind towards their new advisor. For best practice, Redtail recommends automating a part of this process by using automatons and workflows like the ones included here.

Helpdesk Link: http://bit.ly/howtoRTU

MORE >>

Onboarding Automation

TRIGGER EVENT:

→ *Contact Status Changed*

AUTOMATION ACTION:

→ *Action Type:* ***Link Workflow from Template***

→ *Action Item:* ***Onboarding Workflow***

IF ALL CONDITIONS TRUE:

→ *Contact Status* → *Equal to:* → ***Active Client***

Onboarding Workflow

***Recommended to use with Automations**

Target date = 3 Months after Workflow is created

STEPS	TASKS	OUTCOMES
1	**CONTACT DATA** *(11 Weeks before target date)*	
	• Basic information • Contact Photo • Contact details • Servicing advisor • Writing advisor • Email addresses • Addresses • Phone numbers • Maiden name (if applicable) • Set up contact family • Add memberships	• Completed >> Initial Client Meeting
2	**INITIAL CLIENT MEETING** *(On target date)*	
	• Reach out to schedule initial client meeting	• Meeting Scheduled >> One Year Anniversary
3	**ONE YEAR ANNIVERSARY** *(35 Weeks after target date)*	
	• Mail client anniversary card	• Completed **>> COMPLETE WORKFLOW**

**All of Redtail's best practice recommendations in these "How to Handle" documents are intended to provide a starting point for each office or database to develop their own processes from. These are not intended to comprehensively represent industry standards or compliance requirements. Terminology used in the examples may vary depending on the Database Lists, Templates, and other personalizations unique to each database.*