# Three Tips for Making Client Onboarding Less Painful

Tom Petty once said that waiting is the hardest part, but in my estimation, getting started is a lot harder than any waiting you'll ever do.

If you've worked in business for any length of time, it quickly becomes apparent that client onboarding is one of the most stressful processes your company can work through.

Every company in every industry puts time, thought, and effort into streamlining, reorganizing or offloading their onboarding procedures. If you can think of it, it's been tried.

Robo-advisors are just one way the advisor industry is seeking to make client onboarding easier, through the digitalization of new accounts.

And while online new account opening is fantastic, it's not the only way to make client onboarding less painful.

Here's a few tips:

## Set up a new client process workflow in your CRM

If you're using a CRM (and you should be, as we covered here) then you should also be using workflows. Workflows are great for more than just the offhand client request or client meeting follow-through, though. You can create any number of lengthy, complex tasks and tie them together to bring your team the consistency you need when onboarding new clients.

From the first piece of paper to be signed to the last training meeting you conduct, you can be sure that you standardize all your new client communication and the experience that goes along with it by using workflows in your CRM.

If you're a Salesforce user, you can go beyond the standard workflows and processes to get even more in-depth with Orion integration partners like ProcessComposer.

If you'd like to do more reading about how a CRM can help your firm, click here.

## Use video and other means to help clients get acquainted

We often extol the virtues of video, and at Orion we put our recommendations into practice.

If you've converted to Orion recently, you know that a lot of our new client training takes place through the videos we've uploaded into Assist Me. Your initial tutorials about trading, advisory fee billing, reporting, and more are all consolidated into quick and easy-to-watch video tutorials. And what's more, Assist Me helps you navigate common questions in Orion Connect even after implementation is over.

Video can help you and your new clients get acquainted, faster. Instead of helping each client individually, you can scale your business by pointing them to a few helpful tutorials.

Your videos don't have to be fancy, just helpful. Here's a few ideas to get started:

- Record yourself welcoming your new client to the firm with a simple video greeting you can email out after your first meeting. You can use this video to introduce everyone in your office.
- Ask the Orion team for help setting up a demo Household, and then screen record yourself using it to navigate your Client Portal to help your clients use it for the first time

- If you have to send paperwork to a client, send a video to help walk them through and explain it in greater detail than you could in an email or letter.

## Use an online new account opening solution

The last recommendation for simplifying client on boarding is one you've heard from us, and many others, before: Implement an online new account opening solution. There are many advisor-facing robo-advisors that can help you digitize your new account opening.

Even if you're not ready for the full robo-advisor solution, you can digitize your account paperwork through services like LaserApp or DocuSign to make the entire process a little easier on your staff and your file cabinets.

With the right amount of planning and a little preparation, you can turn client onboarding into a scalable and efficient practice instead of one that causes your team to stress out and worry about missed steps and happy clients.

## Need some help with where to go next? Contact Orion's SME teams for questions about apps, reporting, and more.

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