Tips, Tricks, and More on Getting Started

Whether you want to organize your firm, better serve your clients, or grow your business, Botkeeper has a solution for you. Using a powerful combination of skilled accountants alongside machine learning and artificial intelligence (AI), Botkeeper is here for you and your clients 24/7.

You've already been exposed to Botkeeper's basics during the sales process—but we want to make sure you're prepared to launch your firm on the Botkeeper platform and successfully onboard each of your clients. Here are some helpful tips and tricks from our most successful partners that will help you think through the deployment process and ensure you have a great start with the Botkeeper solution.

Embrace change!

We know- change can be intimidating, especially during the initial setup period. It can be easy to revert back to doing things the way you're used to or are familiar with, but your Botkeeper Customer Success team has developed processes and tools to ensure yours and your clients' success. We encourage you to let yourself fall in love with (and use) the new Botkeeper provided tools. If you're uncomfortable or have questions, we're here to help you every step of the way!

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Make the Most of Your Time With Customer Success

Stick to the schedule as much as you can. The Customer Success team is one of our most valuable resources at Botkeeper—they're constantly in high demand. While they do their best to accommodate schedule changes (they know as well as anyone that life happens), regular or frequent changes introduce delays in getting up and running—and we want to bring you value as quickly as possible!

Prepare for a Braindump

First thing's first- upload your brain into the Botkeeper platform. Just kidding. Humans don't have built-in USB ports, so there's no quick solution for the knowledge transfer required to get you and your clients up and running on the Botkeeper platform. But working collaboratively with your Botkeeper team, being patient, and preparing the information requested ahead of time will ensure an efficient and smooth deployment.

Define Best Practices

Bring your Practice Management tools and established processes with you—the Botkeeper Customer Success team can help you organize and transfer best practices over to the Botkeeper platform. Before your deployment call, get organized. That is, think through and collect your existing practices around communication, transaction management, month-end, etc. This will give us the insights we need to provide the best guidance on how to utilize and integrate your existing processes.

Bucket Your Clients

Group and prioritize your clients into lists based on their level of adaptability. Who will be the easiest to transition to Botkeeper? Who will need more handholding? Traditional clients who are used to handing you paper documents (bank statements, receipts, etc.) in person may have a harder time adjusting to a fully automated platform. Transition your more adaptable customers first so you can see their process (those who are a bit more tech-savvy or comfortable with change), and start documenting questions they have. That way, by the time you get to your less adaptable customers, you've armed and ready.

Figure Out Your Contract and Pricing Plan

Are you adjusting your pricing for your clients now that you have Botkeeper? Will you be adding some new language into your contracts about any tasks being performed by a third-party service or data being hosted externally? Do you need to add disclosures in your client engagement letters about the Botkeeper Operations team working outside of the United States? Now's the time to get the language and changes buttoned up for your firm. As always, your Botkeeper team can help point you in the right direction if you have any questions!

Explain, Explain, Explain

Remember: change can be difficult. It's easy to throw your clients into their Botkeeper Client Portals via a quick email outlining the shift. But that often overlooks the biggest question your clients might ask: why? It helps to offer them reassurance that you're still working with them as their trusted advisor and that you believe this software will provide a better experience.

Announce to your client that change is coming as early as possible. This will help to set expectations, get ahead of any preliminary questions, and warm them up for the next steps. We've put together a great Client Announcement email template for you to use if needed. Take the time to reinforce your relationship with your clients. Explain that you (or your team) will still continue to serve them and will be overseeing any work the Bots perform. Address their concerns and needs, and reassure them that any unique processes your firm currently performs for them will continue.

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Release Features Slowly

Our most successful partners found that the gradual rollout of the Botkeeper Platform left their customers feeling well acclimated to the tool. Start off slow—once you're comfortable in the tool, show your clients around, go through the various elements of the Client Portal and make sure to hit on the benefits of the new experience. For example, once their accounts and third-party applications are connected, they'll see a new holistic view of their business, including both financial and non-financial information. And don't forget, as an admin on the client's account, you can block certain features by going to the client's settings menu in the Client Portal. This empowers you to release features to your clients at your desired pace.

Relate to What Your Client Already Knows

If your clients are already on QuickBooks Online (QBO) they're probably accustomed used to connecting and reconnecting bank feeds. Botkeeper's bank authorization feature is the same process they would experience on QBO, and it's just as secure. Highlight any similarities in the current process and flow to make them feel more comfortable using the features of the Botkeeper platform.

Who's Who?

Whether Botkeeper is communicating with your colleagues or clients, don't forget to divulge the layers of who will be doing what, when. Maintaining relationships during the transition to the Botkeeper platform is key for a happy client transition. Explain that the simple, automated tasks are covered by automation, but if your clients need you for anything—performing a complicated task, for example—let them know they can always pick up the phone and speak to you. Reassurance goes a long way!

This list should help provide you with some direction on how to get the most out of Botkeeper from day one. But if you have any additional questions regarding your deployment process, we're happy to answer them for you. Just shoot your Customer Success Specialist a note.

We're thrilled to have you as a Botkeeper Partner! Go forth, and grow!