

The 5-Page Guide to Setting Up Workflow Automation That Works

with Kellie Parks, CPB





INTRODUCTION

If you own an accounting firm, you know that keeping up with client needs, managing endless tasks, and staying organized can be difficult to deal with.

That's where setting up solid workflows and smart automation comes in—and this guide makes it easy for you to get started.

Created in collaboration with Kellie Parks, CPB, this guide contains everything you need to transform your processes from chaos to calm. Kellie has a knack for helping businesses go from “oh no” to “automated flow” by laying down the essentials of creating systems that actually work. Her golden rule? “Automation built on lousy systems will accelerate lousy outcomes.”

That's right—this guide is about getting it right from the ground up so your systems make things easier, not harder.

You can watch a replay of Kellie's session at Workflow Summit [here](#).



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Laying a Strong Foundation

Jumping into automation is exciting, but before you get carried away, setting up solid workflows is important. As Kellie Parks puts it, “Automation built on lousy systems will accelerate lousy outcomes.” In other words, if your processes are messy, automation will just make the mess messier. By creating clear, efficient steps first, you’re setting your automation up for real success, not amplifying potential mistakes.

Key Benefits of Effective Workflow Setup

1. **Time and Cost Savings:** You’ll save time for your team and clients by reducing redundant steps.
2. **Enhanced Client Experience:** When clients know what to expect and feel cared for, they’re more confident in the process.
3. **Increased Compliance and Accuracy:** Standardized steps ensure requirements are met without missing a beat.

Setting Up Your Workflow Foundation

1. **Start with the End in Mind:** Think about the outcomes you want from your processes and automation. Starting with the end goal allows you to reverse-engineer each step, creating milestones along the way that lead directly to success.

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2. Create Milestones and Checklists: Identify each milestone to make sure nothing is overlooked. These milestones, or “workbacks,” are your roadmap to get from Point A to Point Z. Use detailed checklists to guide you through every stage, from starting tasks to client check-ins and final handoffs.

[Use our 50+ workflow checklist templates starter pack to get started.](#)

Elements of an Effective Workflow

As you create your workflows, consider these essential elements, especially during a client onboarding process:

1. Initial Discovery: Begin with a form to assess client compatibility and requirements.
2. Scope Assessment: Review necessary documentation to define the work ahead accurately
3. Engagement and Payment Setup: Secure client commitment and establish recurring payments.
4. Client Education: Prepare your clients with the knowledge they’ll need for collaboration and software use.

The Seven Milestones of Onboarding

Mastering client onboarding is all about structure. Here are seven milestones to ensure a smooth process:

1. **Discovery Phase:** Start with a simple form that screens potential clients for compatibility. Verify key requirements, like compatible software, to identify the clients who are a “great fit.”



2. Initial Call and File Review: After confirming compatibility, conduct a brief call and a paid file review. This step clarifies the client's needs and ensures everyone has aligned expectations.
3. Quote and Payment Setup: Finalize service terms, provide a quote, and set up recurring payments. This formalizes your relationship and sets a smooth foundation for ongoing work.
4. Information Gathering: Collect all essential documentation from the client before starting work. If clients struggle to collaborate at this stage, it's a sign that they may not be an ideal fit.
5. Engagement Letter and Documentation: Once you complete the file review, ask the client to sign an engagement letter. This step confirms your agreement and commitment to each other.
6. App Implementation and Training: Introduce clients to the software and tools they'll be using and provide guidance to ensure a smooth transition.
7. Client Education: Educate clients on communication, data use, and collaboration within your process to give them confidence and understanding.

You may be interested in: [Nikole Mackenzie's Workflow For Onboarding New Clients](#)



Automation Best Practices (The Do's and Don'ts)

It's tempting to dive into fancy apps but start simple. Instead of a complex tool, begin with a spreadsheet or document. This approach keeps your focus on outcomes and avoids getting lost in unnecessary features.

Automating Client Communication

To automate communication effectively, balance efficiency with personalization. For instance, you can create templated weekly check-ins. A consistent format, like "This Week's Financial Overview," reminds clients of your ongoing work and highlights any key issues or wins.

Using Templated Client Communication

While automation saves time, not all emails should be automated. Use templates for recurring updates but retain the ability to personalize them based on specific client needs.

Consider adding a note like, "We noticed a discrepancy in [specific category] this week. Here's our recommended action..." This maintains a personal touch, communicates your expertise, and reinforces the value you're bringing to the client.

Tools and Tips for a Seamless Workflow Management

Consider tools like Financial Cents for managing tasks, client communication, and data organization. With features like task assignments, document tracking, and app integrations, this software can help streamline workflows for firms of all sizes.



Tips for Ongoing Optimization

1. Regularly Review and Refine: Set time aside to review and adjust workflows based on feedback and your firm's evolving needs.
2. Set Task Dependencies: Ensure that tasks are completed in the correct sequence. For instance, tasks like bank feed clearances should be prerequisites to reconciliation to avoid errors.
3. Communicate Value in Weekly Reports: By sending a templated weekly report, you emphasize the ongoing value of your service. Highlight discrepancies, trends, or actionable insights, demonstrating your proactive role as a trusted partner.
4. Customize for Client Needs: As you refine workflows, add client-specific templates or reminders for high-priority documents and insights to tailor the process to their unique requirements.



About Financial Cents

Financial Cents is a workflow management software that has all the features you need to get work done in a simple user interface that your team will love it and find it easy to use.

Whether you're just beginning to document your processes or have been doing it for a long time, our software will get you up and running quickly. Track & assign work, set up recurring tasks, store client information, automate client data collection, and more with Financial Cents.

Don't take our word for it; hear what our [clients](#) have to say. Visit www.financial-cents.com to enjoy a 14-day free trial.

