BOOKMINDERS®

Outsourced Accounting Solutions

Our Onboarding

	Sales Process	Service Initiation +2 weeks	Setup +12 weeks	Transition + 6-8 weeks	Ongoing
Client	• Choose services	Attend weekly meetingsProvide data	Authorize paymentsHandle deposits/receipts	 Coordinate with custom Review financial reports 	ers and vendors
Business Development	Review requirementsIdentify goalsPropose services	Provide overviewIntroduce staff	Verify fulfillment		
Client Relations Manager		Assign resourcesSchedule meetings	Oversee setup process	 Supervise transition 	Assure quality
Setup Bookminder		Attend meetingsDesign system	Implement systemDeliver serviceStreamline processes	Transition to ongoing bookminder	Serve as alternate
Ongoing Bookminder				Learn account processing	Attend meetingsDeliver services