

A PRACTICAL GUIDE

The Bookkeeper's Client Onboarding Kit

A step-by-step guide for solo bookkeepers to capture client data, set up document requests, and run a repeatable monthly close

Made by the Braxis machine

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What this is

This guide is for solo bookkeepers.

It is a practical method, not a promise of a result. It contains no invented statistics, no fake customers, and no guarantees. The words were drafted with AI assistance.

Use the checklist at the end on a real piece of work this week.

1. Define the Intake Workflow

Start by mapping every touchpoint from the first inquiry to the signed engagement letter. Use a simple spreadsheet or free project-management board to list tasks, responsible parties, and deadlines. Create a welcome email template that includes a brief questionnaire covering business type, accounting software, reporting frequency, and key contacts. Attach a PDF checklist of required documents so the client knows exactly what to gather. Schedule a 15-minute discovery call to clarify any ambiguous answers and confirm the timeline. Record the call notes in a shared folder labeled with the client's name and date, then update the workflow board to reflect the agreed-upon start date. This structured intake eliminates back-and-forth emails and ensures you have all essential information before the first month begins.

2. Build a Standard Document Request Package

Design a reusable request package that can be emailed or shared via a secure cloud folder. Include sections for bank statements, credit-card reports, payroll registers, sales invoices, expense receipts, and any industry-specific reports. Use clear file-naming conventions, such as "YYYYMM_ClientName_BankStatement.pdf," to keep files organized on both sides. Provide a short instruction sheet that explains how to export data from common accounting platforms and how to compress large files. Offer a deadline for each document batch—typically the 5th of the month for the prior month's data—to give yourself enough time for review. Follow up with an automated reminder if the deadline passes, and keep a log of received versus missing items in your workflow board.

3. Set Up a Repeatable Monthly Close Calendar

Create a calendar template that outlines each step of the monthly close, assigning dates and durations for data entry, reconciliation, review, and reporting. Populate the calendar with recurring events such as "Import bank feeds," "Reconcile credit cards," "Prepare trial balance," and "Client review call." Use color-coding to differentiate tasks you perform versus items you need from the client. Share the calendar with the client via a read-only link so they can see upcoming deadlines. Automate reminders for key dates using free email scheduling tools. At the end of each month, conduct a brief post-close debrief to note any bottlenecks and adjust the calendar for the next cycle, gradually refining the process.

4. Package and Publish the PDF Guide

Write the guide in a word processor using headings, bullet points, and numbered steps for easy scanning. Keep the design minimal: a clean font, consistent spacing, and a simple cover page with the title and your contact information. Export the document as a PDF to preserve formatting across devices. Upload the PDF to a file-sharing service that provides a direct download link, such as Google Drive or Dropbox. Create a short landing page or a dedicated email template that includes the download link, a brief description of the guide's benefits, and a call to action for the client to confirm receipt. Test the download on multiple devices to ensure the file opens correctly before sharing it with clients.

5. Deliver the PDF Instantly and Capture Feedback

When a new client signs the engagement letter, trigger an automated email that includes the PDF download link and a brief onboarding checklist. Use an email automation tool that can send the message immediately after the contract is signed. In the same email, ask the client to confirm receipt and to let you know if any sections need clarification. Set up a simple feedback form—such as a Google Form—with three questions about clarity, usefulness, and any missing information. Review responses weekly and update the guide accordingly. By delivering the PDF instantly and gathering feedback, you reinforce professionalism and continuously improve the onboarding experience.

Checklist

- ☐ Create a welcome email template with a client questionnaire
- ☐ Assemble a standard document request package with naming conventions
- ☐ Build a monthly close calendar with color-coded tasks and deadlines
- ☐ Export the onboarding guide as a PDF and host it on a secure link
- ☐ Automate the PDF delivery email and include a short feedback form

Where this came from

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