

ACCOUNTING PARTNERS THE NEXT 30 DAYS

WHAT CAN AN ACCOUNTING PARTNER EXPECT OVER THE FIRST 30 DAYS OF WORKING WITH BOTKEEPER?

Botkeeper wants to set you and your firm up for success! During your first 30 days after the sales cycle, we'll guide you through our highly effective deployment process. Each phase of deployment has been refined to ensure you hit the ground running. Here you can find the full deployment timeline.

SUPPORT:

You will always have the support you need because your dedicated team is with you every step of the way. From the initial kick-off call with your Growth Partner, through deployment with your Customer Success Lead, and then into ongoing services with your BotOps (Botkeeper Operations) team, we are with you every step of the way.

Starting with your Growth Partner who will launch your deployment, they'll schedule a kick-off meeting to review the deployment process and introduce your firm to the Botkeeper Partner Platform. This will ensure you are familiar with the platform for deployment. Next, Customer Success guides you through your deployment so your clients are properly deployed on the Botkeeper platform. Then Customer Success will transition you over to Botkeeper's ongoing services where the BotOps team jumps in.

DEPLOYMENT AND BEYOND:

During deployment, start by letting Botkeeper's Customer Success team join you deep down in the weeds! Tell us about your clients in a dedicated questionnaire. Review your client's account credentialing (bank, credit card, and 3rd party applications) so we can make sure they are connected and synced with QBO/Xero.

Then we will work with you to document all of your client's processes and procedures and the particular nuances (I bet they have a few!). We'll put together a dedicated playbook for each of your clients based on the information we collect so your firm and Botkeeper both have access and know what needs to get done.

Once that's complete, we'll transition all of your bookkeeping functions over to the BotOps team. As we work in your client's books daily, we may have questions along the way which we will ask for your guidance on. Then when you are in ongoing services, your dedicated Growth Partner and BotOps team will meet with you on a recurring basis to verify your client's books are meeting your expectations. We want to make sure you are always getting the most out of your Botkeeper partnership!



Have new clients whose books aren't in the best of shape? The Botkeeper team can help handle both clean-up and cloud accounting software migration so you successfully deploy the client on to the Botkeeper platform.

Want to launch a few clients at a time? No problem! During deployment you will receive dedicated training for you and your staff to learn about the best way to utilize the Botkeeper Partner Platform. Learn how to quickly and easily onboard new or existing clients in the future.

The next 30 days after your sales cycle are going to be amazing! Buckle up for your Botkeeper partnership journey.