



banqup
by unifiedpost

How to transition your customers to digital administration





Introduction

Discover our step by step guide, recommendations and tips to help make the transition to digital administration as efficient as possible for your customers.

Learn how to make sure your customers are ready for digital administration, and the steps to take to transition.

This guide will help you to:

-  Get your firm ready to guide your clients.
-  Guide your clients toward a digital switch, one step at a time.

1

Is your firm ready to transition your customers to digital administration?

Do you want to make your role easier and have your customers digitally deliver their documents to you each quarter? If so, then your firm needs to make sure you, your team and your infrastructure are ready to support your customers in the best possible way.

Guarantee the transition towards digital administration runs efficiently for your customers with the following processes.

A. Is my software digital proof?

Good news, it only takes a computer and an internet connection for your firm to receive and process your customers' documents digitally. Therefore, you can ask your customers to send their documents digitally straight away.

If you work with accounting software that can read digital formats, the processing will run even more smoothly.

This means that you can start supporting your customers in their digital transition straight away. Once your customers are set up, you will then be able to receive and process their documents in an efficient manner.




B. Who will be the coordinator?

It's important to have a project manager within your team, who can act as a point of contact regarding the digitisation of your firm. Ideally this will be someone who embraces digital tools and technology.


What are the project manager's tasks?

1




Planning the roll out of Banqup for customers.

2



Drawing up a communication plan aimed at customers.

3



Acting as the digitisation advocate for both your firm and your customers.

4



Supporting and guiding colleagues with demos and training courses.

C. Inform your team

Inform your team about the importance of digitisation for both your firm and your customers. Make sure the team are aware of the objectives and the direction your firm is moving towards.

Explain the following benefits of digitisation to your team and inform them on the steps you will be taking to transition your customers to digital administration.

Benefits for your firm:



More control.

Digitisation will distribute your quarterly tax declaration peaks more evenly and allow the processing to be spread over time.



Help your customers.

By guiding your customers towards digital administration, will help reduce the stress and time it takes for your customers to manage their administration.



Save time.

As all of your customers' documents will be housed in one digital place, and will therefore be easy to receive, your firm won't need to spend the time searching through stacks of paper and emails.



More guidance for your customers.

As less time will be spent managing admin tasks, your firm will therefore have more time to guide and collaborate with your customers.

D. Which customers to address and guide

When it comes to any new clients, always suggest to start them on their digital journey straight away so that the process is simple for them to adopt from the get go.

For existing clients, try to transition them in segments so that it is not too much work to transition them all at once. Take a look at the following pointers on how best to segment your customer base.

	Simple organisation	Complex organisation
In favour of digital	Top priority	Medium priority
Against digital	High priority	Low priority



Top priority:

These customers are easy to convince. They are most likely already quite digitally savvy and will be accustomed to using their smart phones and apps on a daily basis.

With these types of customers, you can help 10-20 of them at the same time.

Think of these customers as ones that are already working within industries that rely on digital technologies e.g. telecoms, IT, marketing etc.

High priority:



With this target group, you may need to convince them of their move to digital administration. Once they are sold on the benefits, the transition will be typically quite fast and smooth.

Help 5-10 of these types of customers transition at the same time.

These customers will often be quite dynamic, but may be quite time poor.



Medium priority:

Your medium priority customers will be aware of the added value of using digital technologies, but they may be put off by the implementation process and the time they think it will take.

These customers will need lots of guidance and support, but once they see the first few steps they will then understand the benefits of digital administration quite quickly.

Talk to these types of customers one at a time to ensure a smooth transition.

Low priority:



The low priority customers will most likely not be open to digitisation, and guiding them make take a lot of time and effort.

Talk to these customers about digital administration during your periodic meetings and take them on baby steps when transitioning.

2

Your client's **transformation**

In this section, learn the step by step process to transition your customers to digital administration:

- Firstly, learn how to inform your customers about the benefits of managing and submitting their invoices and financial documents digitally.
- Secondly, discover the added value of this new way of working. You will want your customers to look forward to the ease of using digital administration.
- Finally, learn the steps to transition towards digital administration and the tools available for ongoing support.

Transitioning some of your customers may be a challenge. You will have to convince them to replace old, traditional methods with forward thinking, new ones. Therefore, you may need to explain to your customers exactly what digital administration entails, and how it will reduce a lot of their administrative burden.

Once you have communicated the benefits successfully, provide your customers with the right guidance and tools to help them along their transition.

1 Phase 1:

Informing your customers about digitisation

Firstly, educate your customers on what digital administration entails. Then let them know that your firm is completely set up for digital administration, therefore their transition should be simple process.

This is also a good opportunity to let your customers know that your firm is forward thinking and fully digitally proof.

The best way to communicate to your customers at this stage would be via an email newsletter, highlighting the changes and the benefits. Link to information on your website and include options for your customers to download guides and more information on what digital administration means for them.

Further along the guide, find examples of email newsletters that you can send out to your customers.

2

Phase 2:

Highlighting the benefits of digital administration to your customers

Phase 2 is all about highlighting the benefits of digital administration to your customers. This will require communication via email, blog posts, guides etc. Throughout this guide you will find examples of guides and blogs you can use and send to your customers.

You may not wish to send this information to all of your customers at once. Potentially send the benefits just to your top priority customers highlighted in the segmentation section.

Once these clients are on-board with the benefits and their transition, it will make it easier to communicate to your other customers.

3

Phase 3:

Guidance & support

Making sure your customers have the right level of guidance and support is key. Not only do they need to understand the transition steps, but they need to be aware of the ongoing support that will be available once they have transitioned.

From Banqup videos, to help desk support to a Customer Services team.

4

Phase 4:

Encouragement

Your customers will be champions of digitisation if your firm continually encourage it. Communicate regularly about the importance of digitisation and what it means for their business.

Feel free to use Banqup guides, blogs and videos to continue the communication so that the benefits are always at the top of your customers' minds when using the Banqup platform.

Make sure to have regular contact with your Banqup Account Manager, if you ever need more help on how to communicate the benefits and use of Banqup to your customers.

Phase 1: inform



Emails



Newsletters



Leaflets

Phase 2: convince



Emails



Newsletters



Webinars



Coming soon:
introduction
videos

Phase 3: guidance & support



Guides



Transition
guide



Webinars



Demo
videos



Blogs

Phase 4: encouragement



Material from
previous phases



Banqup:
follow-up
customers



Training
through Banqup
consultants

Phase 1: inform



Example

inform content

* Find ready to use content below that you can send to your customers. Amend where you feel necessary and address your customers in your firm's tone of voice.

Email - Phase 1 - Inform

Introductory mail for a new customer

Dear,

We're happy to welcome you as a new client, thank you for trusting us with your bookkeeping. We will do everything we can to support you in the best possible way.

This also means that we are highly committed to your digitisation, because we believe it's in your best interest.

Digitisation allows us to work more efficiently and it lets us cater to your needs much faster and more accurately. But it also has a lot to offer your customers. You will have more control, a better overview of your finances, whilst reducing the time and cost you spend on your admin tasks.

Needless to say we absolutely recommend digitisation.

Don't hesitate to contact us for more information. We're more than happy to advise and support you throughout the shift from paper based processes to digital administration.

Informing existing customers

Title: Did you know that you can process and manage your business' entire administration digitally?

Dear xx,

As your consultancy firm, we're committed to giving you the best possible advice. That's why we'd like to inform you of new tools that will enable you to implement a fully digital administration. One of those tools is Banqup, which we highly recommend. We use it ourselves.

Banqup allows you to process and manage your entire administration digitally:

- Scan paper documents with the app.
- Create and send invoices with the app.
- Centralise all your documents in one place, with access anytime and from anywhere.
- A digital archive that is stored for seven years (so no more need for a physical archive).
- Share all your documents directly and digitally with your accountant.

You can always rely on us to guide you through your shift from paper based processes to digital administration..

Inform entrepreneur - active mail

Title: Have you considered digitising your administration?

Dear,

As your accountancy firm, we're committed to giving you the best possible advice. That also means we want you to enjoy all the benefits of a fully digitised administration. The tool we advise to make that happen – which we also use ourselves – is Banqup.

With the user friendly tool of Banqup, you can digitise your administration and enjoy these benefits:

- All your documents (invoices, receipts and contracts) are centralised in one place: accessible anytime and from anywhere.
- An overview of your entire cash flow (revenue and costs, outstanding invoices, payment reminders, deadlines, ...).
- The possibility to very easily scan paper documents (like invoices and receipts) within the Banqup app.
- The possibility to easily create, send and follow up on invoices.
- The possibility to pay incoming invoices in an intuitive way.
- A secure archive that you can access anytime and from anywhere.
- All your documents are sent directly and digitally to your accountant.

Furthermore, by digitising your administration you will have the tools available to gain more insights and more control over your business' finances. These tools will enable you to work more comfortably and accurately to overall save you time and money.

Unsure of the additional workload of transitioning to a digital administration tool? With the right guidance and the right tools, you will have a seamless transition and the many benefits will be worth the transition project.

Plus, we will be with you for the entire journey.

Don't hesitate to contact us for more information.

Newsletter – Phase 1: Inform

In your newsletter inform your customers that your firm supports digitisation.

Information regarding digitisation

By digitising your administration, your admin and finance processes can run more smoothly and efficiently. Digitising your admin also allows us to provide you with even better advice and support. Banqup is the online tool that can help. It enables you to:

- Scan paper documents (invoices and receipts) with the app.
- Create and send invoices with the app.
- Centralise all your documents in one place, with access anytime and from anywhere.
- Keep a digital archive that is stored for seven years (so no more need for a paper archive).
- Share all your documents directly and digitally with your accountant.

Want to know more? Don't hesitate to contact us. We offer advice and support during the entire transition.

More information about Banqup: (www.banqup.com)

Phase 2: convince



Newsletter - Phase 2: Convince

Periodically send this newsletter to convince your customers about digitisation.

Is your quarterly VAT declaration causing you stress?

Would you rather be spending time enjoying life than focusing on administration?

Digital administration is the solution:

- Have a much better overview of all your documents and house them in one digital place.
- Easily submit your documents and spend less time entering manual data.
- Improve the accuracy of your documents with automated processes.

Want to find out more? Get in touch with us and we will guide you towards digital administration with Banqup.

Banqup is the perfect tool for your digital administration.

Email - Phase 2: Convince

Title: Lighten your workload with digital administration

Dear,

As your accountancy firm, we're committed to giving you the best possible advice. That's why we're sending you this email about digital administration, which has a lot to offer you. Some examples:

Convenience

Your documents are available anytime, anywhere. You no longer have to worry about documents getting lost, typos or manual errors. Plus, you have the added benefit of being able to store all of your documents digitally, therefore saving you physical space.

Control

You will always have an overview of your finances. You will have an up to date overview of your revenue, costs and outstanding invoices. Plus, you will receive reminders when a payment is near its due date.

More time

With more digital and automated processes, you will reduce the time you spent gathering documents, entering data and checking accuracy.

Cost effective

All these benefits mean you save a lot of money.

The tool that we advise to make all this happen – which we use as well – is Banqup.

Don't hesitate to contact us for more information. We're more than happy to advise and support you throughout the shift from paper to digital administration..

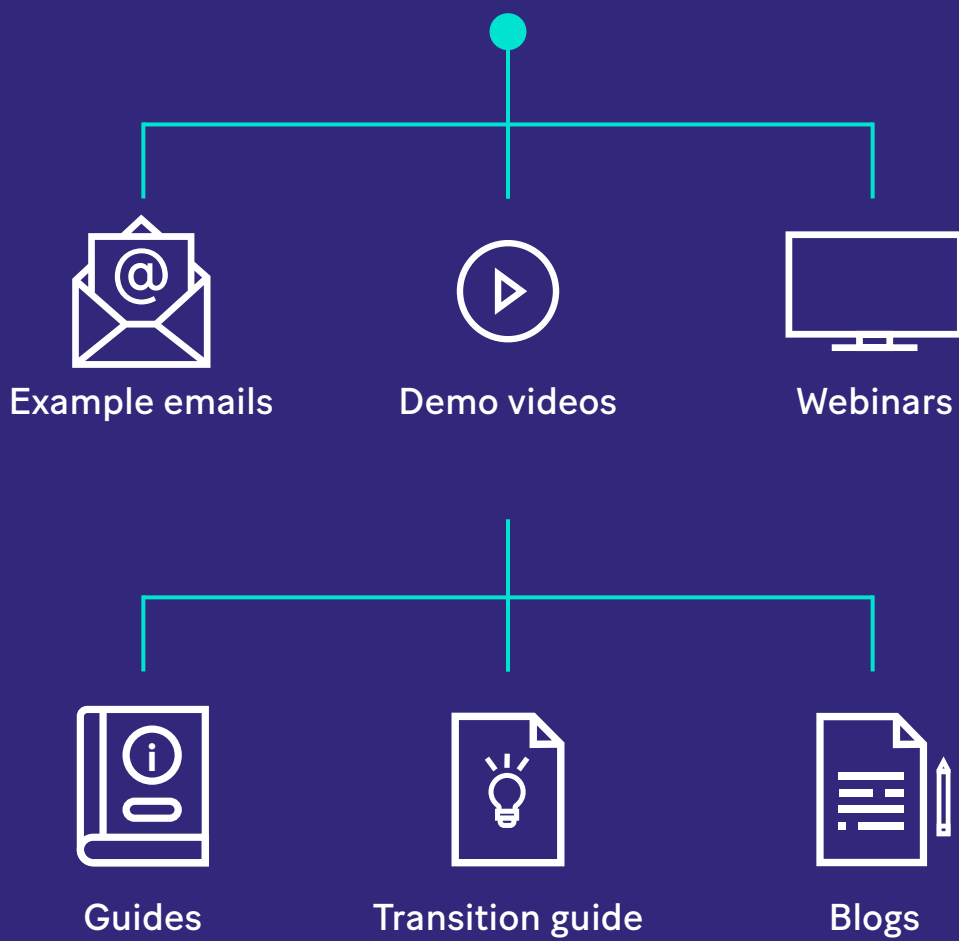
Want to know more about Banqup?

Have a look at their website (www.banqup.com)

You're also welcome to join a webinar to find out how Banqup works.

www.banqup.com/be/en/eventpage

Phase 3: guidance & support



Newsletter - Phase 3: guidance & support

(choose one of the options per newsletter)

Make your transition to digital administration as smooth as possible. Download the Banqup guide here.

Need help to transition towards digital administration? Download the Banqup guide to learn the step by step process.

Is your transition towards digital administration running as smoothly as were hoping? If not, then take a look at the Banqup guide for tips.

Email - Phase 3: guidance & support

Dear,

Digitising your administration is certainly the way forward. Not only will you reduce the amount of time you spend on admin, you will also have a better overview and more control over your finances.

At the same time, we understand that the transition towards digital administration does require some work. But we are here to help guide you on your way:

1. We advise you to start as soon as possible. Digital administration is a new way of working and the best way to tackle it is to set aside one day per week to work on your digitisation.
2. Start simple. Firstly, integrate a few invoices and a couple of receipts. Once you have got the hang of the Banqup platform, then start to increase your use. Take a look at the Banqup help videos to assist you.
3. Once you have started to master the tool, then start to use it to create and send invoices.
4. If the Banqup link to our own accountancy software has been activated, we will automatically receive your documents. If you are not sure if the link is active, just let us know and we will look into it for you.

By following these steps, your digital administration will be up and running in no time.

For more information, take a look at the Banqup blogs and guides.

Email - Phase 3: guidance & support (version 1)

How to smoothly transition towards digital administration

Dear,

We are glad to see that you are transitioning towards digital administration. We understand that the processes take some getting used to, therefore we want to make sure we are supporting you as much as possible.

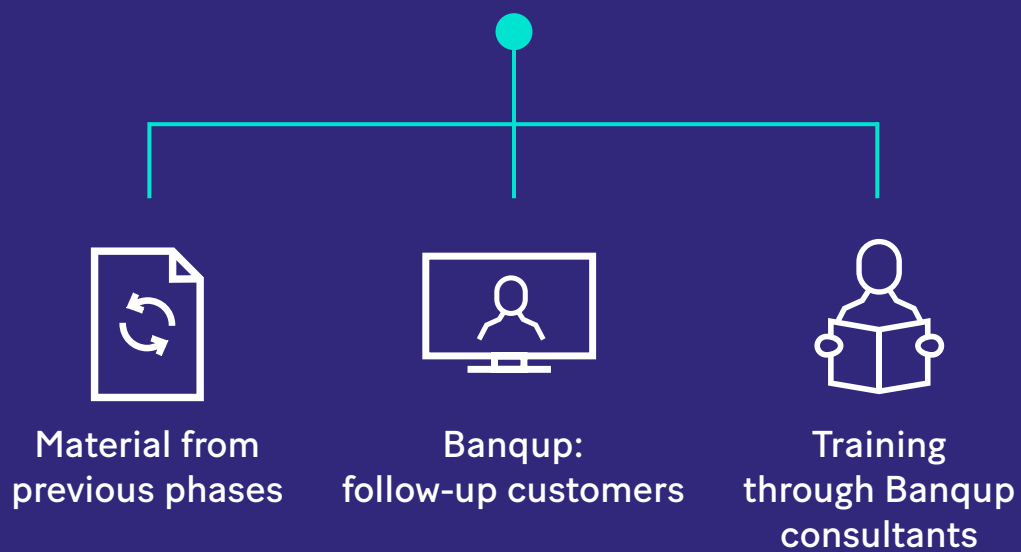
Take a look at our tips below to make sure you are having a smooth transition:

- We advise you to start as soon as possible. Digital administration is a new way of working and the best way to tackle it is to set aside one day per week to work on your digitisation.
- Start simple. Firstly, integrate a few invoices and a couple of receipts. Once you have got the hang of the Banqup platform, then start to increase your use. Take a look at the Banqup help videos to assist you.
- Once you have started to master the tool, then start to use it to create and send invoices.
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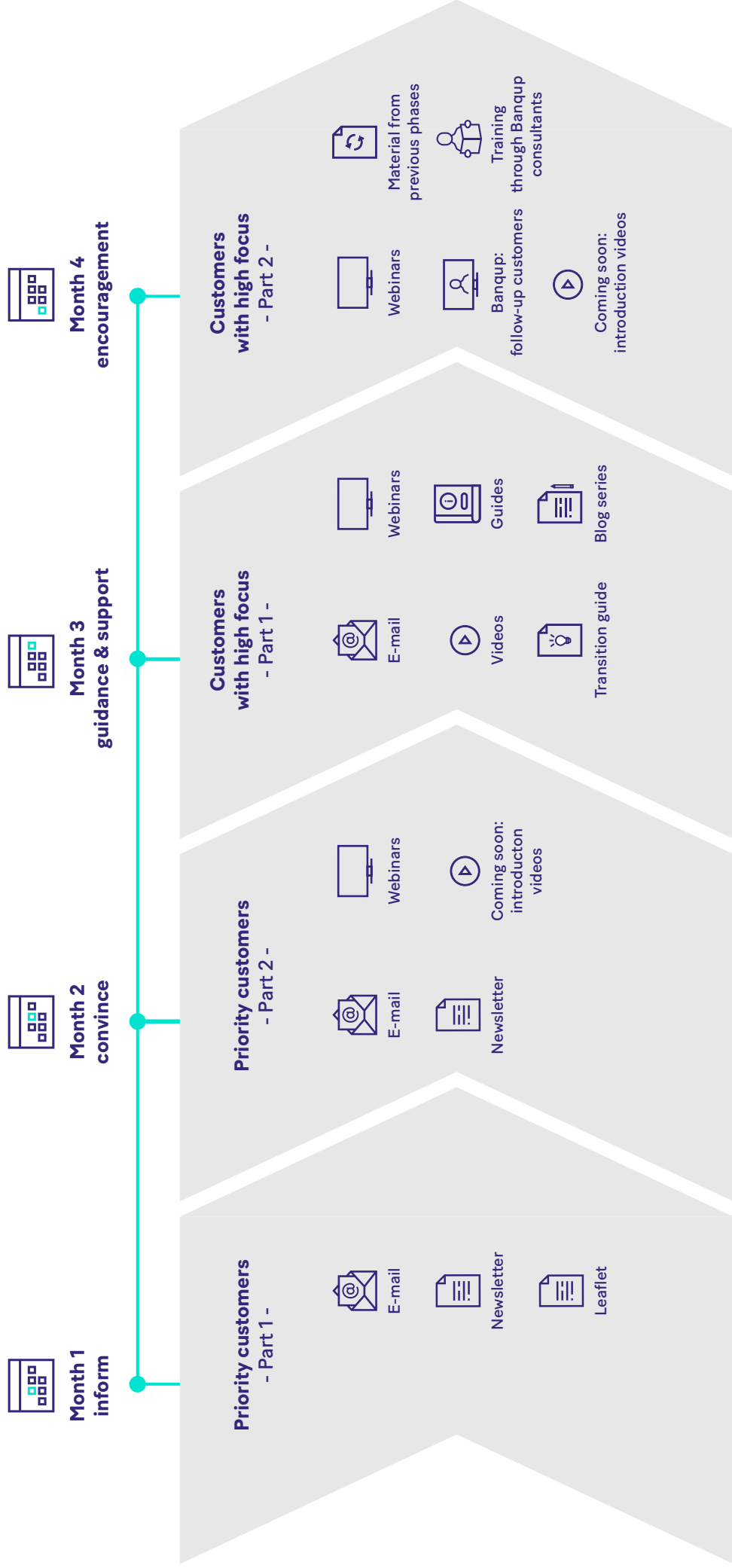
For more information, take a look at the Banqup blogs.

Phase 4: encouragement



Onboarding plan template

Timeline





**Do you have
any questions?**

Contact us:

help@banqup.co.uk and support@banqup.co.uk

www.banqup.com



banqup
by unifiedpost

Banqup for accountants

As an accountancy firm, we firmly believe that digital administration is the way forward. Not only does it save time, but it will increase business efficiency and allow you to offer the best service to your customers. This is why we have invested heavily in the right infrastructure, software and training to offer you the best possible service.

Therefore, we invite you to do the same and manage your administration digitally.

Take a look at the digital administration benefits for your company:



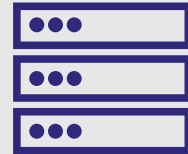
More time:

no more looking for receipts, no more Excel sheets, no more documents to file.



Convenience:

you no longer have to keep everything in folders that you have to deliver to us.



More room:

no more need for physical archives.



Accuracy:

improve accuracy with automated processes and less human intervention.



Overview:

access to a complete overview and digital dashboard.



Cost effective::

All of the previous points will reduce your admin costs.

We understand that the transition requires some work. Take a look at the following ways we will support your journey:



Advice on the required tools, how to start and how to use the platform.



Webinars, training and workshops.



Guides, videos, blogs and tutorials.

A digital administration will give you – and our collaboration – a big boost.

Don't hesitate to contact us for more information.