How We Onboard Our Clients

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Each Client varies in the kind of services they need and how much work they need to keep up. For Potential Clients who seek our services, we go through a multiple stage onboarding process with them to ensure that our Firm is the right fit for their needs.

Step 1

We start with an intro call where the Potential Client describes the services they are looking for, and we also explain the onboarding process.



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Step 2

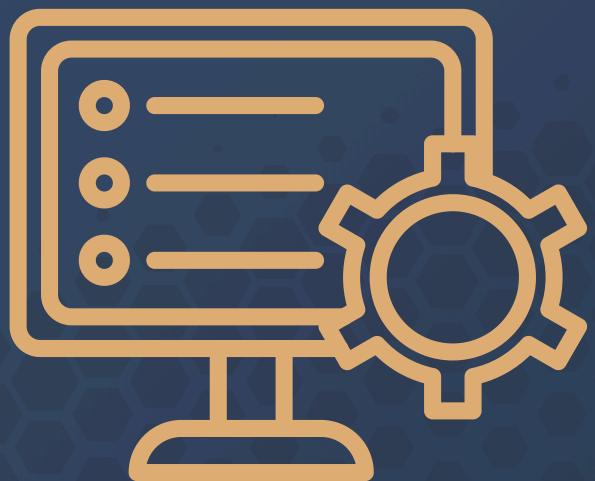
From there we give the Potential Client access to our Online Portal where they sign our Privacy Policy and fill out a couple questionnaires for general information about their business as well as their values and goals.



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Step 3

After evaluating the Potential Client's responses, we request some of their financial records and gain access to their books for a better understanding of how much work we would need to do to maintain their accounting as we move forward. We also send the Potential Client a questionnaire on their data security procedures.



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Step 4

We then analyze their records and begin to evaluate potential services for a Proposal. Once the Client agrees to our Proposal, we convert it into an official Engagement Agreement. This Agreement normally has 3 parts to it: The Engagement Letter, Services Addendum, and the Client Policies, Terms, and Conditions Addendum.



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Step 5

After the Engagement Agreement is signed we begin setting up to begin recurring services and other services detailed in their Engagement Agreement. We also provide a summary of the professional engagement standards and ethical considerations important to the engagement.



Throughout the onboarding process, we keep several factors in mind when evaluating the Potential Client relationship. We document our Evaluation during and after moving through the onboarding steps.

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and to learn more about how we can help you and your business, contact us at contact@leacif.com

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