

SAVE 2.5 HOURS PER CLIENT FROM

Collaborative Client Engagement

A business efficiency consultant reviewed minute-by-minute administrative steps for the three segments below to support a client through their process.



PROSPECTING

- Crafting introductory email with requirements
- Checking email for responses against the "checklist"
- Following up emails/notes
- Receiving, managing and organizing documents provided by client

CURRENT PROCESS

110

mins per
Prospect

WITH SIDEDRAWER

40

mins per
Prospect



ONBOARDING

- Reviewing additional check-list items and preparing request notifications
- Organizing document folder structure
- Ensuring all attachments across team are maintained within client folders
- Co-ordinating with other professionals
- Preparing signature

40

mins per
new Client

11

mins per
new Client



ONGOING ENGAGEMENT

- Co-ordinating with client's family or professionals over existing/new documents
- Re-sending documents on client request
- Preparing emails and updated documents for client reviews

73

mins per
existing Client

20

mins per
existing Client

While your processes may be different, the administrative time may still be preventing you from scaling your practice.

Contact us! +1 (855) 663-7070 or hello@sidedrawer.com



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