SafeSend Returns

Firm Onboarding Commitment

1 Consulting Call

Week 1
1 - 1.5 hours

- Team Champion
- Team Leader
- Admin Leader

2 Account Setup

Week 2
1 - 1.5 hours

- Team Leader
- Admin Leader

3 User Training

Week 3
2 hours

- All potential SafeSend Returns users

4 Momentum Call

Week 4
30 minutes - 1 hour

- Team Champion
- Team Leader
- Admin Leader

Firm Onboarding Tasks

1 Consulting Call

- Assign roles & responsibilities
- Discuss objectives, policies & processes
- Develop action plan
- Review communication materials
- Schedule account setup & training

2 Account Setup

- Review account settings/user management
- Discuss firm-wide options
- Test new account with sample returns
- Compile questions for training

3 User Training

- Demo the client experience
- Hands-on experience by all attendees
- Train on features
- Review Best Practices guide

4 Momentum Call

- Review progress with Client Success Manager
- Review & adjust firm goals/processes with working knowledge
- Answer remaining questions