



**How do you
facilitate your
client's digital
transition?**



Singapore's No. 1 on



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Introduction e-guide

In this e-guide, you will find guidelines, step-by-step plans, recommendations and tips to make the transition to a digital administration as smooth as possible. In the first part, we focus on your firm and discuss how you can make sure that you are ready to guide your clients to a digital administration.

In the second part, we dive deeper into that guidance and propose a step-by-step plan to help your clients actually make the transition.

This e-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 convince your clients to transition to a digital administration?

Do you want your clients to deliver their documents digitally? Then make sure your team and your infrastructure are ready to support them in the best possible way. That way, you can guarantee things run more efficiently and remain manageable, and that everyone stays motivated.

This e-guide helps you discover how far along you are in this process and which aspects you can still improve.

A. Is my software digital proof?

Good news: a computer and an internet connection suffice to receive and process your clients' documents digitally – so you can ask your customers to send their documents digitally right away.

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

This means you can immediately start supporting your customers in their digital transition. And once everything is running smoothly, you can begin to find out how you can make receiving and processing the documents even more efficient.

There are two ways to link your accounting software with Banqup:

1. Take a look at our website and view all linked accounting or ERP packages.
2. Use our Accountant Console, which is free of charge for ISCA registered accountants.

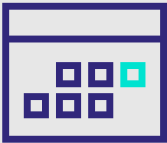


B. Who will be the coordinator?

It's important to have a project manager in your team, who can act as a point of contact regarding the digitization of your firm. Ideally, this is someone who embraces digital tools and is convinced of their added value. This could be you, or another employee with the right skills.


What are the project manager's tasks?

1




Planning the roll-out of Banqup for customers and their dossier managers.

2



Drawing up a communication plan aimed at customers.

3



Acting as the central point of contact, who can convince everybody involved that digitization is in the interest of both the firm and the customer.

4



Supporting and guiding colleagues with demos and training courses.

C. Inform your employees

Inform your team members about the importance of digitization for your firm and inform your colleagues about the objectives. In which direction do you want your firm to go?

Explain the benefits for your firm to your employees and inform them on how you're planning to guide the customers in the transition to a digital administration.

Below you'll find a summary of benefits for the company. You can print them or distribute them digitally to your colleagues.

Please contact the Banqup employees for advice and guidance.

Benefits for the company:



You get more control because digitization distributes the quarterly tax declaration peaks more evenly (processing can be spread over time)



You help your clients by guiding them in the digitization of their business. This also reduces stress, prevents loss of time and gives clients more control over their administration.



You save time, because everything is easily retrievable and there is no need to search through folders and piles of paper.



The time you save can be spent on more meaningful work, such as providing more advice for your customers and collaborating more interactively.

D. Segmentation: which clients to address and to guide

When it comes to new clients, always suggest to kick off the collaboration digitally. Is it a start-up? In that case they likely don't have any bad administration habits to shake. And companies that do need to switch up their administration, are often open to adopting better methods. No matter the type of client you're working with, you can guide and support them from scratch, which makes things a lot easier. Feel free to use our e-guide for entrepreneurs as support.

In addition, you will need to guide your existing clients during their transition. Obviously, you can't help them all at the same time, so segmentation is key. We can help you with that, so you can focus your efforts – low-maintenance clients first – and avoid overburdening your firm.

	Simple organization	Complex organization
In favor of digital	Priority	Average focus
Against digital	High focus	Low focus



Priority:

These clients are easy to convince. After all, why would they prefer a paper-based administration while smartphones and apps dominate the rest of their daily lives? They are digital savvy and the transition is relatively easy to manage for your firm. You can help 10 to 20 of these types of clients with their transition at the same time. You will mostly deal with people under 40 years old in industries that rely heavily on digital solutions (ICT, telecom, marketing, and so on) and highly educated people in creative professions. This goes for both small (fewer than 5 employees) and larger (20+ employees) organizations.



High focus:

With this target group, you'll have a lot more convincing to do. But once you've overcome that hurdle, the transition is typically fast and smooth. You can help 5 to 10 of these types of clients with their transition at the same time. They are often very dynamic but extremely busy entrepreneurs, younger than 40.



Average focus:

These clients are aware of the added value of a digital administration, but are put off by the implementation process. These people need more guidance and support. You have to make them realize that it's simpler than they think it is, which will often require a personalized approach. We're mostly talking about one-man businesses, run by entrepreneurs that are between 40 and 60 years old.



Low focus:

These clients are not open to digitization and guiding them will require a lot of time and energy. You can talk to them about this topic during your periodic meetings. People older than 65 and/or with a lower education are often less enthusiastic when it comes to adopting new technology.

2

Your client's transformation

In this part, we help you to guide your client towards a digital administration, step by step.

- We start by informing your clients about the possibility of managing and submitting invoices digitally.
- After that, we focus on the added value of this new way of working. We want them to look forward to reaping the many benefits of what is essentially a minimal effort.
- Once they express the desire to change, we provide them with the right tools and guidance (step-by-step plan, manuals/videos, training, workshops, webinars, and so on)

Once they're transitioning, the right guidance and support is key to success.

'Turning' an entrepreneur can be quite a challenge. You have to convince them to replace old habits by new methods. So tell them what a digital administration entails and how it will solve the many typical paper-based problems.

Once you've succeeded, you will need to give them the right guidance and follow-up. After all, you don't want mistakes or ignorance to drive them back to their old habits.

Below, you will find an overview of the different phases and their appropriate communication initiatives.

1

Phase 1:

Inform them about digitization

First, you communicate to your clients that your firm is completely set up for a digital administration and that you highly recommend them to switch as well. You also explain to them what a digital administration entails.

This is also a good opportunity to stress that your firm is a fully future-proof partner in general. The best way to address existing clients is to send an email or to include the digital message in your newsletter, stressing the importance and the benefits of a digital administration.

You can also add information to your website and include additional documentation (brochure, e-guide, ...) and mention this during an intake meeting or during the onboarding of a new client.

In this e-guide we provide examples of emails and newsletter items that you can use in this phase, including a brochure and an e-guide for entrepreneurs.

2

Phase 2:

convincing your client of the added value of a digital administration

This part is all about convincing your client of the benefits of a digital administration. This requires more thorough communication via email, newsletters, blogposts, and so on. In the annex of this e-guide you will find ready-to use examples.

If you don't want to send this communication to all your existing clients, at least target the clients who have already shown interest (by requesting information for example) and the clients that you have included in the segmentation we talked about earlier.

In this e-guide, you will find examples of emails and newsletter items that you can use in this phase.

3

Phase 3:

Guidance & support

In this phase, you check if your client is aware of the many benefits of a digital administration, if they know all the options of the tool (Banqup) and if they are using them correctly. Which improvements can be made to make the process more efficient?

You can use the Banqup demo videos or the link to help.banqup.com and all the other assets that Banqup provides: blogposts, the e-guide for entrepreneurs, starters guide, webinars, tutorials, and so on.

4

Phase 4:

Encouragement

Communicate regularly about the importance of digitization. Repeat the previous steps (email, newsletter). Feel free to use the communication items by Banqup (blogs, newsletter, etc.). Inform your client of important tool updates or new possibilities. And make sure they can easily contact you when they have questions (dedicated contact with specific email address and phone number, FAQ or information page on your website or PDF, etc.).

Regarding the follow-up: you can add a note in the file of clients who are already operating digitally. This way, every time you contact them you'll be reminded to check if everything is working as it should and if they need any help.

In addition, you can follow up on clients who have started to work digitally but are sending you less documents than you would expect. Contact them and ask how you can be of help. Or ask your Banqup account manager to assist you in drafting a reactivation plan.

Banqup also offers tools like webinars, tutorial videos, this e-guide and blogposts.

Phase 1: inform



Examples
e-mail



Examples
newsletter



Leaflet

Phase 2: convince



Examples
e-mail



Examples
newsletter



Coming soon:
Webinars



Coming soon:
introduction
videos

Phase 3: guidance & support



E-guide
entrepreneurs



Starter's
guide



Coming soon:
Webinars



Demo
videos



Specific blog
series on this
topic



E-guide
entrepreneurs

Phase 4: encouragement



Material from
previous phases



Banqup:
follow-up
customers



Training
through Banqup
consultants

Phase 1: inform



Content

for the different phases

* Below you will find ready-to-use content to send to your clients. But don't hesitate to modify it so you'll address your clients the way they've come to expect from you (for example if your clients are used to a more formal tone of voice)

Email - Phase 1 - Inform

Introductory mail accountancy firm – promotion for firm

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 digitization, because we believe it's in your best interest.

Digitization allows us to work much more efficiently and it lets us cater to your needs much faster and more accurately. But it also has a lot to offer you: it brings you comfort, more control and a better overview, and it saves you a lot of time and money.

Needless to say we absolutely recommend digitization.

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

Inform entrepreneur - neutral mail

Title: Did you know that you can process and manage the entire administration of your company 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.
- Centralize 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.
- Send and receive invoices via the nationwide e-Invoicing network InvoiceNow.

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

Title: Have you considered digitizing 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 digitized administration. The tool we advise to make that happen – which we also use ourselves – is Banqup.

But first things first: why would you want a digital administration? Well, a user-friendly tool like Banqup has a lot to offer. The most important advantage are:

- All your documents (invoices, receipts and contracts) are centralized 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) with the 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 for seven years.
- All your documents are sent directly and digitally to your accountant.
- Send and receive invoices via the nationwide e-Invoicing network InvoiceNow.

Moreover, a digital administration offers you more insight in – and therefore more control over – your company's finances. This enables you to work more comfortably and accurately and it saves you time and money.

Afraid of the additional workload that often goes hand in hand with this kind of transition project? We can assure you: if you handle it well, and with the right guidance, it's not that big a deal. And more importantly: the many benefits will make the effort more than worthwhile. Plus, we're there for you all the way!

Don't hesitate to contact us for more information.

Newsletter – Phase 1: Inform

In your newsletter you can inform your clients that your firm supports digitization.

Information regarding digitization

Digitizing your administration makes it run much more smoothly, efficiently and conveniently. It 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.
- Centralize 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.
- Send and receive invoices via the nationwide e-Invoicing network InvoiceNow.

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.sg)

Phase 2: convince



Newsletter - Phase 2: Convince

Newsletter – convince (periodically – for example in the ramp-up toward the quarterly installment dates)

Suffering from quarterly GST declaration stress?

Or

Does your administration often give you a headache?

Or

Would you rather spend your weekends on leisure than on administration?

Or

Want to waste less time on administration?

(choose one of these options and use the other ones for future newsletters)

A digital administration is the solution:

- You have a much better overview: your documents are available anytime and from anywhere, you can update them much faster and you have a digital overview of your revenue and your costs.
- Time gain: you can very easily submit and consult your documents – which also means you have significantly less typing to do - and you can exchange your documents much more easily with us.
- Accuracy: more automation means less manual work (like copying data) and ultimately less human errors. And because you can't (for example) spill coffee on a digital document, it will always remain perfectly readable.

Want to know more? Feel free to contact us, we're happy to advise and support you all the way.

Banqup is the perfect tool for a digital administration. Click [here](#) for more information.

Email - Phase 2: Convince

Title: Lighten your workload with a 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 and from anywhere. They can't get lost, can't become unreadable and there's no risk of typos. Also: you don't have to store them in folders and archives, so you save a lot of physical space.

Control

You always have an overview of your finances. You have an up-to-date overview of revenue, costs and outstanding invoices. And you are automatically reminded when a payment is nearing its due date.

Time gain

No more retyping data, no more keeping numbers in Excel sheets, no more search operations in files and cabinets, fewer corrections needed and no more traveling to bring us your documents.

Money saving

All these benefits mean you save a lot of money.

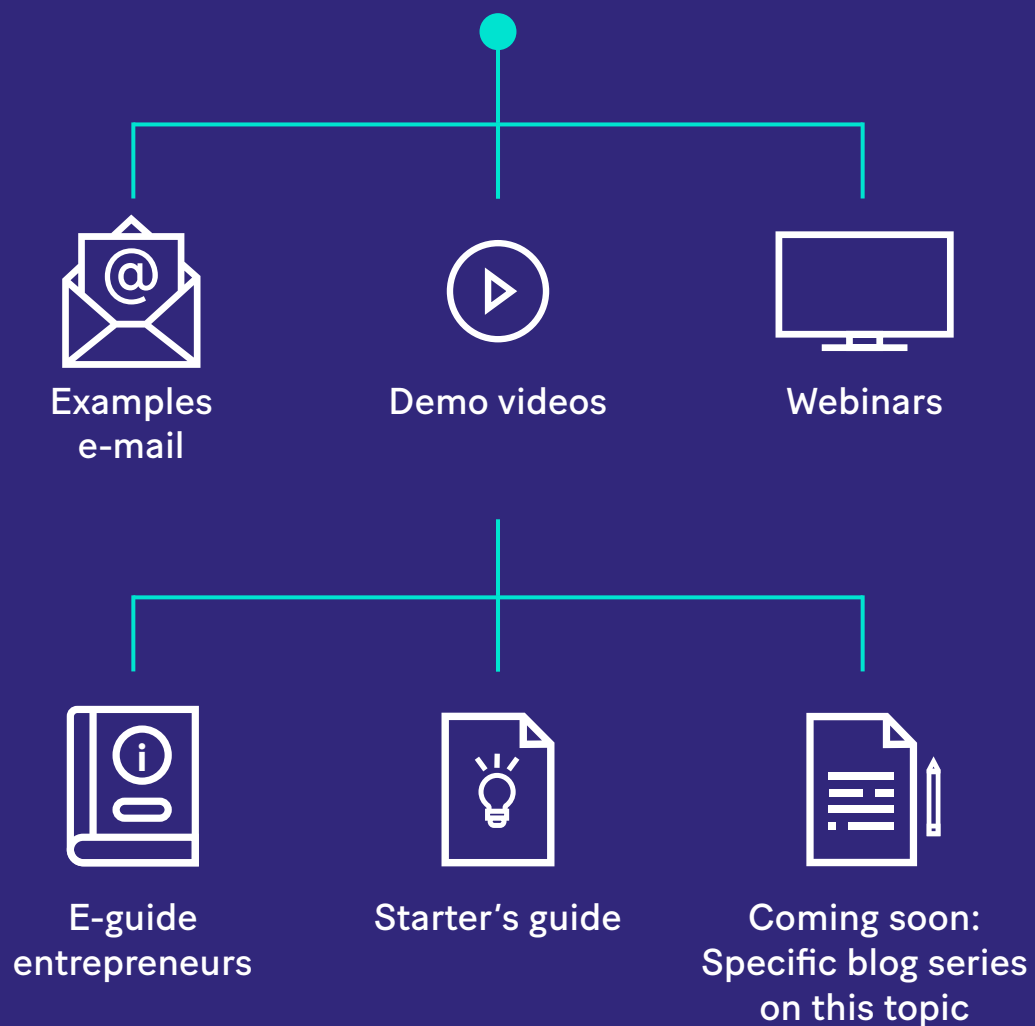
The tool that we advise to make all this happen – which we use as well – is Banqup.

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

Want to know more about Banqup?

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

Phase 3: guidance & support



Newsletter - Phase 3: guidance & support

(choose one of the options per newsletter)

Make the transition to a digital administration as smoothly as possible. Download the Banqup e-guide.

In need of help while transitioning toward a digital administration? Download the Banqup e-guide for step-by-step guidance.

Is the transition toward a digital administration not running as smoothly as you had hoped? The Banqup e-guide comes to your rescue. Download it here.

Email - Phase 3: guidance & support

Dear,

There's no doubt about it: digitizing your administration is the way forward. You save time, get a better overview and more control, and you have much less paperwork to do and archive.

At the same time, we understand that the transition requires some effort. But we're here to help you out, by providing you with the following steps that will help you simplify your transition:

1. We advise you to start as soon as possible. Getting the hang of this new way of working may take some time. The best way to tackle it, is to pick a fixed day in the week to work on your digitization.
2. Start simple. Integrate your first invoices, scan a couple of receipts with the app to get to know the tool. And make sure you read the online manual (<https://help.banqup.com/hc/en-sg>) and/or watch the Banqup tutorial videos.
3. Once you know your way around the tool, you can take the digitization of your documents a step further. For example by drafting invoices directly in the tool.
4. If the Banqup link to our own accountancy software has been activated, we will automatically receive the documents you have digitized. Not sure if the link is active, or need help with something else? Let us know!

Banqup has also published a convenient e-guide. That way, you can always consult these steps.

And make sure you read their [blog series](#) on this topic.

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

This is how you make a smooth transition to a digital administration

Dear,

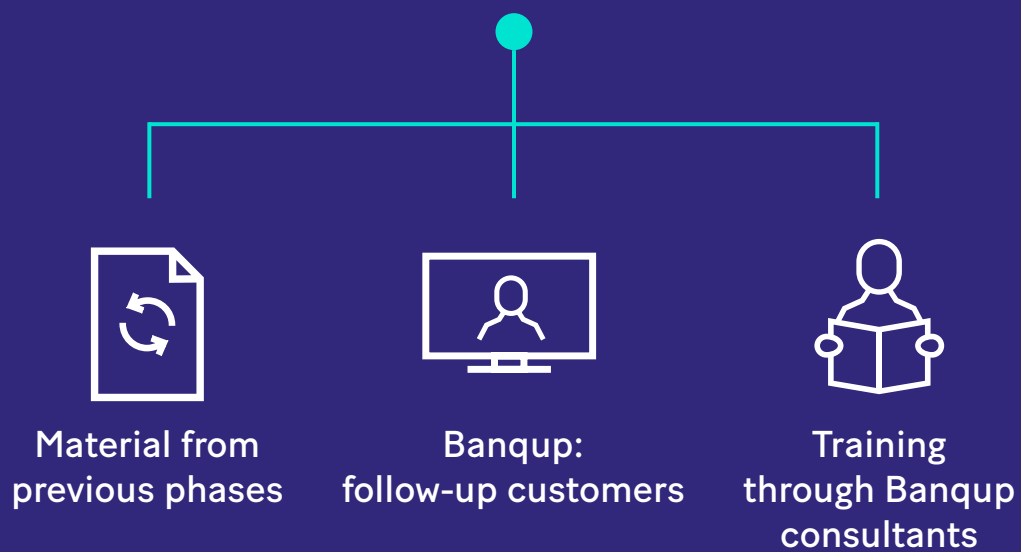
Glad to see that you have decided to go for a digital administration. We understand this takes some getting used to, and that's why we want to support you as much as possible.

In this email we go through the steps you have to take to get off to a good start and to make the most of your digital transition. For a more elaborate overview, we refer to the e-guide you can download [here](#).

- We advise you to start as soon as possible. Getting the hang of this new way of working may take some time. The best way to tackle it, is to pick a fixed day per week to work on your digitization. But whatever you do: avoid procrastinating.
- Start simple. Integrate your first invoices, scan a couple of receipts with the app to get to know the tool. And make sure you read the online manual (<https://help.banqup.com/hc/en-sg>) and/or watch the tutorial videos by Banqup.
- Once you know your way around the tool, you can take the digitization of your documents a step further. For example by drafting invoices directly in the tool. You will soon notice that uploading and processing documents goes quicker, often eliminating the need for that fixed day we mentioned in step 1.
- If the Banqup link to our own accountancy software has been activated, we will automatically receive the documents you have digitized. Not sure if the link is active, or need help with something else? Let us know!

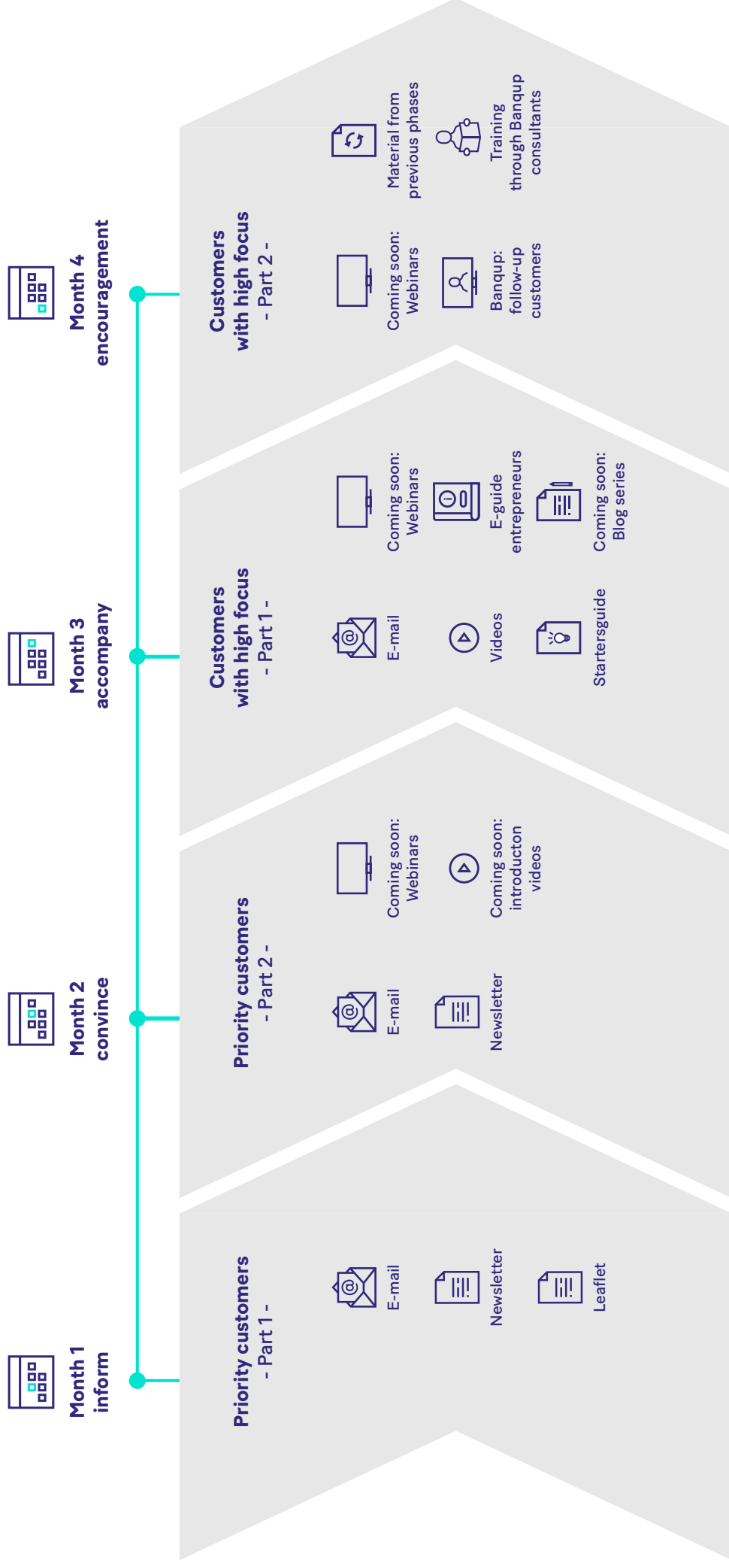
By following these steps, it won't take much effort to use – and benefit from – the endless possibilities of a digital administration.


Phase 4: encouragement



Onboarding plan template

Timeline





**Do you have
any questions?**

Contact us:

help@banqup.sg and support@banqup.sg

www.banqup.sg



banqup

Banqup for accountants

As an accountancy firm, we firmly believe that a digital administration is the way to go. **It saves time, it increases efficiency, and it allows us to offer you even better advice and support.** That's why we have invested heavily in the right infrastructure, software and training to offer you the best possible service.

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

The benefits of a digital administration for your company:



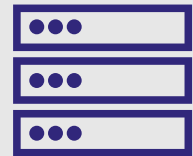
Time gain:

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:

you have much less retyping to
do, significantly lowering the
risk of human errors.



Overview:

you always have access to a
complete and up-to-date digital
dashboard.



Lower cost:

the advantages above also
mean that you save money.

We understand that the transition requires some effort. That's why we've organized our firm in a way that allows us to provide you with all the support you need:



Advice on the required tools
(we work with Banqup), how
to start and how to exchange
documents with us.



Training by means of
information sessions,
workshops and webinars
(which can be organized at our
office or via Banqup).



Documentation:

step-by-step action plan,
e-guides, online tutorial videos,
...

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

Don't hesitate to contact us for more information on sales@banqup.sg