



# INSIDE THE CAAS CIRCLES TRENDS

## A Look Inside the CAAS Circles

This resource offers a behind-the-scenes look at how members of the Boomer CAAS Circles tackle a friction-filled challenge in growing a CAAS Practice: building a client onboarding process that actually works across roles, service lines and client expectations.

### The moment that triggers the conversation

Does any of this sound familiar?

“We sold the client on CAAS, got a signed engagement letter and then handed them to our delivery team. Nobody told the team what the client expected. We started off on the wrong foot before we even got started.”

“Gaining access to clientsbank accounts is a nightmare. Between multi-factor authentication and security codes going to their phone, we spend weeks just trying to see what we’re working with.”

“We have an onboarding team and a delivery team. They don’t talk to each other. Knowledge gets lost in the handoff. The client ends up frustrated. Our people end up frustrated. And then we’re six weeks in and asking for the same documents twice.”

These are the kinds of questions CAAS leaders brought to the table at a recent Boomer CAAS Circle meeting. The firms in the room ranged from regional practices to multi-office organizations with dedicated onboarding teams. Some had just completed a Lean Six Sigma process to redesign their onboarding workflow. Others were still struggling with a process that existed mostly in people’s heads. Nobody has a perfect answer, but the group used each other’s experience to sharpen their thinking.

TO JOIN & FURTHER INFORMATION:

[boomer.com/caasc](https://boomer.com/caasc)