

Streamline client acquisition and onboarding in 4 steps



Client acquisition and onboarding can be lengthy processes (for example, client onboarding can take as long as [two to 34 weeks](#) to initiate). In the meantime, the client isn't getting the help they need, and you aren't managing their assets. How can you streamline the process?

This guide explains step-by-step how to streamline client acquisition and onboarding to create greater value for investors and your advisory.

STEP 1:

Understand who your prospects are

Today, Baby Boomers no longer make up the biggest demographic of investors; rather, it's their children, Millennials. Millennials represent a [30 million-strong bloc](#) of investors and prospects, and they don't communicate the way their parents did.

Millennials feel comfortable with digital communication; they want their advisors to share information with them through texts, webinars, social media, and video conference. To reach this new generation of prospects, advisors need the right technology.

STEP 2:

Choose the right technology for your investment advisory communications

A financial services communications platform offers a variety of communications channels—text, telephony, and video conferencing—to meet your prospects' needs. It makes it fast and simple for prospects to reach out to you, and because it runs in the cloud, you can respond to prospects and clients even if you're not in the office.

STEP 3:

Speed up client onboarding with collaboration tools

A financial services communications platform speeds up internal communication, too. File sharing and an internal presence indicator coupled with unified communications capability make it fast and simple to share information between colleagues and departments, so your entire team can work together to onboard clients faster.

STEP 4:

Communicate with clients quickly

Another benefit of a financial services communications platform is that it allows you to communicate with clients and prospects quickly. Because it runs in the cloud, you don't need to be in the office to answer a prospect's question.

About RingCentral

Speed up client acquisition and onboarding with RingCentral

RingCentral's financial services communications platform helps you speed up client acquisition and onboarding by providing you with instant communication and collaboration capabilities.

To learn more about how RingCentral can help your investment advisory, [get a demo](#) today.

Learn more about RingCentral for investment advisors at ringcentral.com/trusted-advisors

For more information, please contact a sales representative.

Visit us at

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RingCentral, Inc. (NYSE: RNG) is a leading provider of cloud Message Video Phone™ (MVP™), customer engagement, and contact center solutions for businesses worldwide. More flexible and cost-effective than legacy on-premises PBX and video conferencing systems that it replaces, RingCentral empowers modern mobile and distributed workforces to communicate, collaborate, and connect via any mode, any device, and any location. RingCentral's open platform integrates with leading third-party business applications and enables customers to easily customize business workflows. RingCentral is headquartered in Belmont, California, and has offices around the world.

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