Client Experience Toolkit

Automation Essentials

Stay personal at scale. From ‘nice to have’ to ‘wow, they really care’, automate the moments that matter.

FYI automates the moments that matter the most - onboarding, birthdays, check-ins, and reminders - to help your practice stay personal at scale.

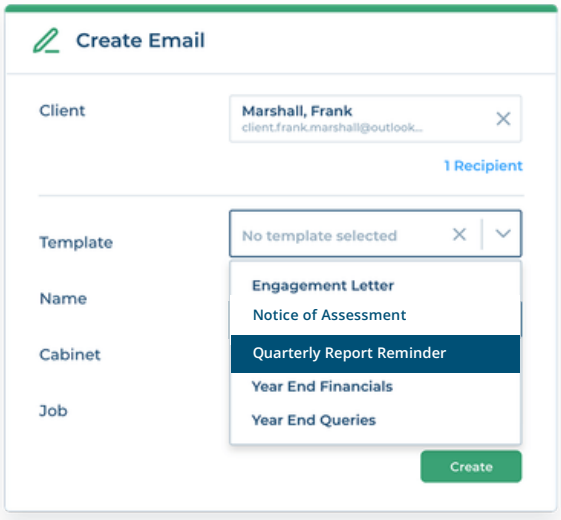
- **2x Automations to deliver unforgettable moments**
- **Templates you can personalise in minutes**
- **Bonus: Birthday Automation**



In today’s high-expectation, low-attention world, clients don’t just remember what you do - they remember how you made them feel. But with teams stretched thin and client portfolios growing, meaningful touches often slip through the cracks.

That’s where FYI steps in to turn thoughtful intent into automated, repeatable action. From welcome emails to quarterly reminders and birthday celebrations, this bundle makes every moment feel personal - even when it's powered by automation.

The result? Clients feel seen, valued, and cared for without your team having to manually manage every interaction. With pre-built templates and workflows, you’ll save time while increasing client satisfaction, loyalty, and referrals. It’s not just automation - it’s experience design, at scale.



Deliver unforgettable client moments

First impressions that say: ‘you matter here’

Take care of your clients from day one, with welcome emails, engagement letters, internal tasks, and milestones all built into a proven onboarding workflow. No balls dropped = more trust built.

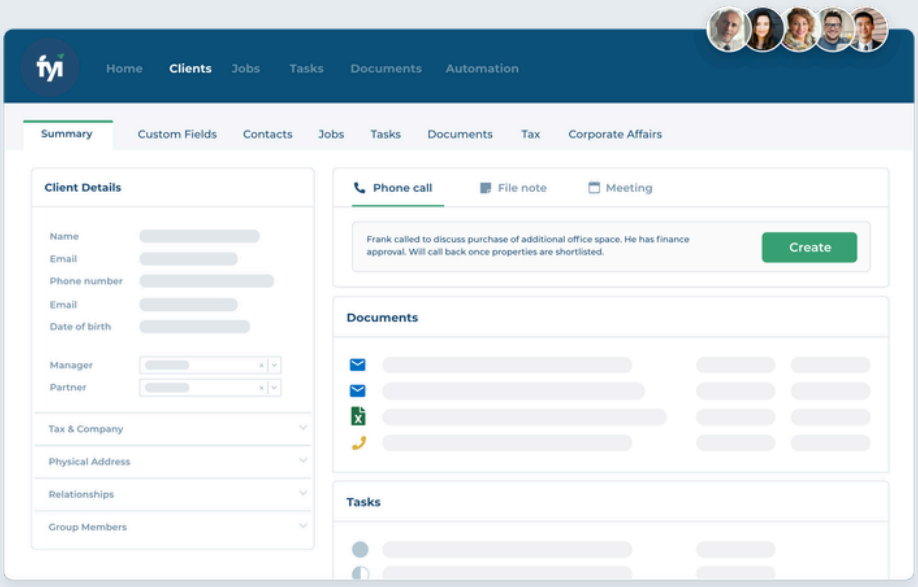
Proactive reminders that say: ‘we’ve got you’

Show up before they wonder where you are with scheduled reminders and automated emails, eliminating the guesswork and missed follow-ups. Stay top of mind by being one step ahead.

Thoughtful gestures that say: ‘we remember what matters’

Next level client care, because remembering birthdays isn’t just nice, it’s a new era of client experience. No need to rely on good intentions, with automated emails, you’ll never miss a birthday again.

> We've built an onboarding automation inside FYI that does all the things you'd expect it to - we've taken the inefficiencies out of the things that make people go 'Why don't they remember to tell me?' No one has to remember it anymore.
>
> STACIE, PARTNER PKF



FYI's automation helps you deliver the best client service possible, automatically creating documents, emails, and tasks, enabling the team to efficiently collaborate and stay on top of the client relationship.

Client Onboarding: 5-star experience from day one

You only get one chance to make a first impression, FYI makes it unforgettable.

Make every client feel like your only client - with FYI's automated onboarding workflow.

Onboarding clients used to feel clunky - a confusing tangle of emails, lost attachments, forgotten tasks, and manual checklists. Too often, key steps slipped through the cracks, making the client's very first experience less than ideal.

FYI's Client Onboarding Automation changes all that. From the moment a new client signs on, welcome emails and engagement letters are sent automatically. Internal tasks are auto-assigned with clear deadlines. Milestones are tracked in real-time, giving your team full visibility. It's a polished, repeatable, brand-aligned experience that rolls out the red carpet - every single time.



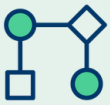
Document Templates

Includes ready-to-use Templates for welcome emails, client info requests, and ethical letters - all easy to personalise.



Defined Tasks

Comes with pre-set Tasks and timelines, so nothing gets missed and everyone knows what's happening.



Sequenced Process Steps

Pre-configured step-by-step process, ensuring your onboarding runs the same smooth way, every time.

Pre FYI Automation "Old Way"	Automation with FYI "New Way"
Ad-hoc emails and communication, inconsistent communication with clients leaving them unsure of what's happening	**Templated and automated communication**, for consistent, clear, and timely communication with clients
Siloed or ad-hoc task lists, no visibility across the team, often leading to confusion and missed tasks	**Pre-defined steps and tasks**, assigned and sequenced for consistency and visibility across every step
Lack of structured and accessible procedure, onboarding feels different every time, slows growth and strains the team	**Defined onboarding process**, scalable and consistent experience for clients and the team



Give your clients the onboarding experience they deserve - download the process now

Quarterly Reminders: Proactive, personal – without the chase

Be the advisor that's always one step ahead with timely reminders that say 'we've got you covered'.

Give your clients peace of mind that nothing slips – with FYI's automated quarterly reminders.

Quarterly reporting is critical to client relationships and compliance, but the process of gathering inputs often becomes a time-consuming burden. Manual reminder emails, repeated follow-ups, and tracking progress through spreadsheets can consume hours each quarter - per client. For many practices, this administrative overhead not only strains internal resources but also creates inconsistency in client communication and increases the risk of delays.

FYI's Quarterly Report Reminders Automation changes all that. At the beginning of each quarter, reminders are scheduled, and emails are sent automatically. With consistent, timely outreach and improved internal coordination, your team can focus more on advising clients and less on chasing them.



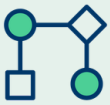
Your return* per quarter:
100+ hours saved
$15,000+ recovered

*based on 30-mins composing emails, 20-mins follow up/tracking, 10-mins of internal admin and check-ins - per client per quarter, at $150hr for 100 clients.



Document Templates

Includes ready-to-use Templates for reminder emails, all easy to personalise.



Sequenced Process Steps

Pre-configured step-by-step process, ensuring your reminders run the same smooth way, every time.

Pre FYI Automation "Old Way"	Automation with FYI "New Way"
Siloed or ad-hoc tracking, no visibility across the team on which clients require comms, often leading to missed clients and deadlines	**Jobs list tracking and automated updates**, providing clarity across the team on the status and progress of quarterly work for clients
Manually chasing clients, relying on team members to create and send emails at key points in time	**Automated client reminders**, pre-defined emails created and sent on schedule to ensure timely results
Lack of structured and accessible procedure, manually confirming lists each quarter, copy-pasting prior quarter emails, high admin strain on the team	**Defined quarterly process**, scalable and consistent experience for clients and the team



Build trust one quarter at a time with precision your clients can count on – download the process now

BONUS AUTOMATION

Birthday Wishes: Thoughtful moments made effortless

Celebrate your clients and the moments that matter to them, without missing a beat.

Make your clients feel valued, even when you're busy - with FYI's automated birthday emails.

Manually tracking and sending birthday messages, with so many clients and so many dates, it's all too easy to forget, delay, or give up altogether. Even with the best intentions, birthday outreach often fell to the bottom of the priority list, resulting in missed moments and inconsistent experiences.

FYI's Client Birthday Email Automation changes that. Using your client data, birthday emails are automatically scheduled and delivered - on time, on brand, and with a personal touch. What used to feel unscalable now happens effortlessly, every year.

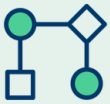
You're not just remembering a birthday - you're strengthening trust, building loyalty, and creating the kind of thoughtful client experience that sets your practice apart.

> Growth comes as a result of providing better services to our clients.
>
> STUART,
> DIRECTOR
> NEILL FAMILY GROUP



Document Templates

Includes ready-to-use Template for birthday emails, all easy to personalise.



Sequenced Process Steps

Pre-configured step-by-step process, ensuring birthday wishes and data is processed the same smooth way, every time.

Pre FYI Automation "Old Way"	Automation with FYI "New Way"
Nice to have sentiment or inconsistent emails, some clients receive emails when/if the team has time and remembers to do so	**Memorable, personalised, and automated emails**, delighting your clients every year with a small gesture that has big impact without the stress
Manually tracking birthdays, relying on the team to remember to do this for clients	**Defined birthday process**, scalable and consistent experience for clients and the team



Show every client they matter, never miss a birthday again - create the process now

Automate your Practice

With several resources, including pre-built automations, it's easier than you think to automate your practice.

Automation Library

Check out our range of process automations, ready for you to import, create, and activate - no need to start from scratch with over 50 common processes prebuilt:

- Choose from a growing library of automations created by the FYI team.
- Auto-create emails, documents and tasks, update jobs, and more - for a range of processes used in accounting firms.
- Example templates are ready to import with just a few clicks.

Simply import, customise to suit your practice, test and activate.

Explore our Automation Library

For step-by-step instruction on importing processes to your platform refer to **Importing Custom Processes.**





Assistance to automate your practice

Whether it's just an extra hand to build an existing process or crafting tailor-made automations from scratch, our expert consultant will work closely with you to optimise your operations for maximum productivity.

Explore our Automation Services

> The way we work has been transformed. FYI has challenged us to improve our processes and to work smarter.
>
> TASH,
> PRACTICE MANAGER
> SIDCOR

Make every second count for more with FYI Process Automation.
For more information on Process Automation with FYI, visit the FYI Help Centre at support.fyi.app

More time for more

fyi.app