

# How to refer clients to BILL Spend & Expense: a step-by-step guide



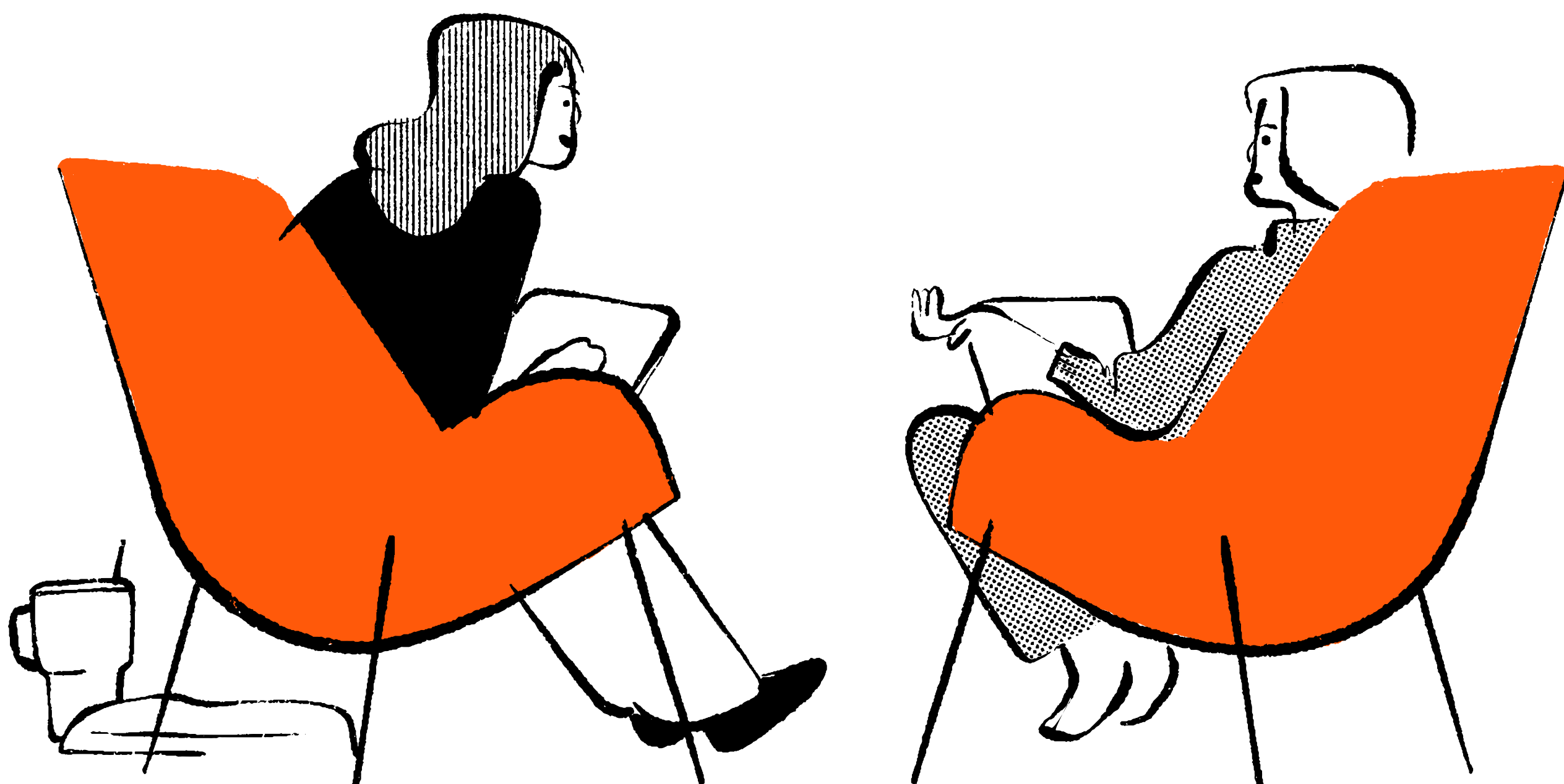
Referring your clients to BILL Spend & Expense shouldn't be intimidating. Whether you're getting ready to refer your first client or you've done this 100 times, it's always helpful to have resources you can look to when you have questions or want to know what's next. This in-depth guide will walk you through what to expect for each step of the referral and implementation process for BILL Spend & Expense.

## Identifying clients

The first step when referring new clients to BILL Spend & Expense is to identify which ones are a good fit. BILL Spend & Expense is a spend and expense management solution that works well for everyone, but there are some indicators that can help you identify which clients will see the most immediate benefit from switching.

### **Ideal clients for BILL Spend & Expense**

- Organizations of all sizes—though we see more success for clients past the start-up phase.
- Clients whose employees need to use corporate cards for expenses.
- Companies that deal with regular reimbursements (i.e., travel, items for events, etc.).
- Companies that deal with regular subscriptions like software subscriptions.
- Companies who spend money on ads (we have a great cashback program for advertising spend).
- Organizations that regularly give their employees stipends.
- Companies who pay out bonuses or SPIFFs/ SPIVs to employees.
- Organizations interested in having a real-time view into everyday company spend.
- Companies with multiple EINs/entities.







## Client readiness

You can also look for indicators in your clients' financials during regular check-ins or meetings. Things to keep an eye out for are:



Missing papers and expense documentation.



Disorganized and out-of-date books and files that require cleanup.



Inaccurately coded expenses or expenses missing codes altogether.



Slow, manual accounting and expense management processes.



Excessive spend on software subscriptions and/or duplicate subscriptions.



# Starting the conversation

## Send an email

Once you've determined which clients will be a good fit for switching to BILL Spend & Expense, you'll need to start the conversation with them. Starting this conversation and convincing your client to switch to a new expense management system can be daunting—after all, you're not a credit card salesperson! But the potential benefits of BILL Spend & Expense outweigh the immediate inconvenience for you and your clients. Plus, we have plenty of resources to make it easier for you. The first step is to set up the meeting or introduce the idea. Send them a quick email to see if they want to jump on a call to chat through spend management. We have a [set of email templates](#) ready for you to use—all you have to do is add your firm and client details. The templates approach your client from various angles, from requesting a quick chat to adding more information about spend management. Pick the best template for the client you're trying to reach. You can also add your firm's branding to [some of our content](#) that they can peruse before the meeting.

## Hold the meeting

Once you're talking with your clients, broach the topic of switching their spend management software—or implementing it in the first place. Here's some examples of conversation starters:

- What are your business growth goals?
- What is your most time-consuming pain point with your business?
- Are you having difficulties closing your books in a timely manner?
- Would you like help with budgets or forecasting?
- Are you getting real-time financial data to guide decisions?
- Would your company be interested in cashback rewards on its spending, including often overlooked spend like online advertising, software subscriptions, and utilities?







### **Address major concerns**

Your client may be reluctant to switch to a new spend management system, especially when it will require them to get new corporate cards\*. Many clients have the same concerns as other clients across accounting firms, such as “We already have a credit card and love the rewards” or “This isn’t a priority for us right now.” These are valid concerns, and we want you and your staff to be prepared to address them with your clients. We’ve compiled [a list of some of the most common concerns](#) we’ve heard from clients and some guidance on how to respond.

\*The BILL Divvy Card may be issued by one of Divvy Pay, LLC’s [bank partners](#). The BILL Divvy Card is not a deposit product. For your specific lender, see your Card Agreement.

Don’t forget that your account manager is available to help you with these conversations. They would love to run a demo for your client, walk them and their employees through the implementation, or even hop on a call to answer some questions. They can even run lunch & learns or other trainings for your staff on the product and how to talk about it with clients. Take advantage of their experience and knowledge!



# Adding a client to BILL Spend & Expense

So you've got a client who's ready to join BILL Spend & Expense. Now it's time to get the process signing them up started! There are currently three ways to do this: through the BILL Accountant Console, through your Partner referral link, or by talking to your account manager.

## The BILL Accountant Console

If you have the BILL Accountant Console, you can add your Accounts Payable, Accounts Receivable, and Spend & Expense clients by clicking the **Add Client** button within the console.

From there, you'll be prompted to fill out some basic information about the client you wish to add. Make sure to fill out this information the same way it will appear on the client's credit application in the next step.



Here's the information you'll need:

- Legal company name
- Company address
- Company phone number
- Company mailing address

Next, select the BILL products you wish to use to help your clients: Accounts Payable, Accounts Receivable, and Spend & Expense. If you haven't yet signed the referral agreement to be a BILL Spend & Expense partner, you will be prompted to do so. Then, select Spend & Expense to start the application process.

## Partner Referral Link

For those partners who don't have a Console, when you signed up for the BILL Accountant Partner Program as a Spend & Expense partner, you received a unique referral link. From that link, you can either submit your client's information through the form or have them fill out the self-serve application. If they do fill out the self-serve application, email your account manager the name of the business and the person who filled it out so they can keep an eye out for the application. Your account manager can also provide this link for you.

## Account Manager

You can also contact your account manager directly to start the sign-up process. They'll be prepared to answer any questions about the application and setup process. They'll also work with you to ensure all the correct information is filled out and your client's account is properly attributed to your firm's account. Your account manager will initially hold a kickoff call and demo with your client. You can choose if you'd like to attend this call with your client—we encourage you to join when possible!



# The application

Once you've kicked off the initial sign up, next comes the application process. This full process can take up to three days, but sometimes only takes a few hours. During the application process, you'll be assigned an Application Specialist who will liaise between you/your client and our internal teams.

The application requires a list of information about your client's business, their financials, and who is going to manage the BILL Spend & Expense account. Here's a list of the types of information you'll need to gather:

- ✓ Business information: legal business name, business addresses, entity type, and formation date
- ✓ Financial information: annual revenue, tax ID/EIN #, desired line of credit, secure bank connection
- ✓ Company owners
- ✓ Account administrator
- ✓ Verification documents

For more in-depth resources on the application process (plus much more), visit our help center. If you have questions about this process, reach out to your account manager.



# Implementation and onboarding

Once your client has been approved to use BILL Spend & Expense, there are two paths for implementation based on how much they spend per month.

## For clients spending over \$25k a month

These clients tend to use more parts of the platform, so they will be assigned an implementation consultant. Your account manager will hold a kickoff call with you, your client, and the BILL Implementation Team. After the kickoff call, you can choose whether or not to attend the rest of the client onboarding sessions.

## For clients spending less than \$25k a month

Your client will be sent curated onboarding resources to guide their setup and will be given full access to our customer support team for answers to their questions and additional support, if needed.

There are steps you and your staff can take to make the implementation process go smoothly, no matter how much your client spends:



Collect a roster of employees.



Identify internal champions.



Set up accounting integrations.



Make the first transaction.



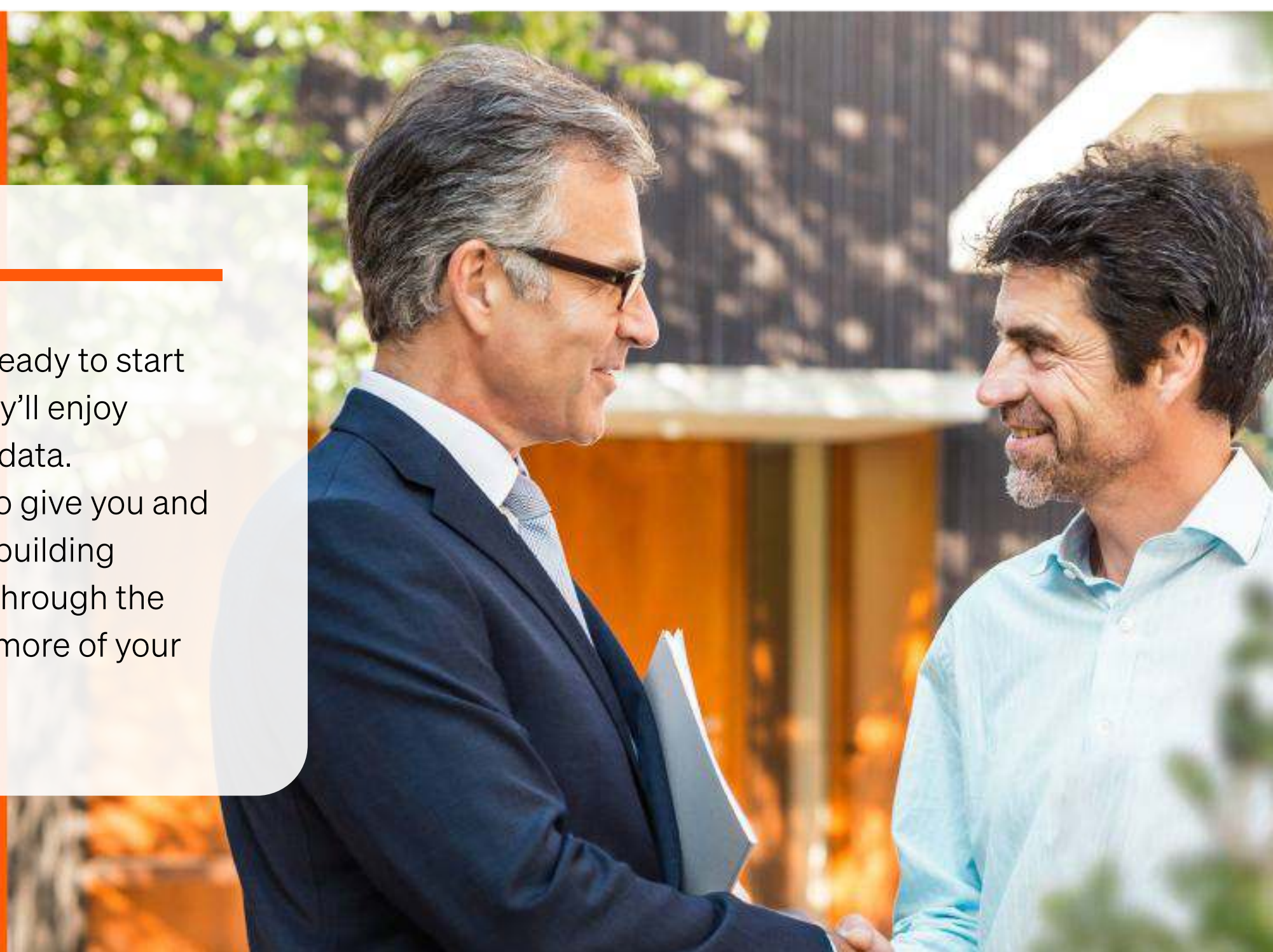
Make a rollout plan.



Layer in additional controls.

Learn more [here](#) about how these steps will impact your client's implementation process so your client is confident about using BILL Spend & Expense right off the bat.

Congratulations! Your client is set up and ready to start spending with BILL Spend & Expense. They'll enjoy enforceable budgets and real-time spend data. Increased visibility into their spend will also give you and your staff more advisory and relationship-building opportunities. Plus, now that you've gone through the referral process once, you're ready to add more of your clients in the future!





# Moving forward

Now that you've got your client up and running on BILL Spend & Expense, your firm can set up a process to allow you to add more clients more quickly.

## Define an onboarding strategy

Even if you've previously referred one or two clients to BILL Spend & Expense, you might not yet have a process in your firm to do this on a larger scale. Spending time upfront to define an onboarding strategy can save you time in the long run. We've created [this guide](#) to walk you through a process your firm can follow each time to help get clients up and running as efficiently as possible.

# Decide on your firm's role in client management

Your client will be making purchases, assigning funds, and uploading receipts every day, but there are different levels of participation for you and your staff. How you manage your client's spend going forward might differ from client to client, or you might keep it the same for all your clients—it depends on your firm's workflows and your client's individual needs. Look at the [different models for managing your clients on BILL Spend & Expense](#).

## Update policies and workflows

This new system will change some of your clients' existing policies and procedures. One of the first advisory services you can provide to your clients now is to help them re-write those policies with spend management in mind. For example, their company might change how they approach their policy for spending money for the company and need to [re-write the expense policy](#). Or they'll need to make a new reimbursement workflow since BILL Spend & Expense can handle reimbursements in the app. Schedule a time with your client to review all their policies and workflows related to spend and discuss how you can update them.

## Expand your CAS offerings

Using BILL Spend & Expense for your clients enables your firm to move on from the manual work of expense reconciliation and receipt chasing to close the books every month and on to offering additional, high-value CAS offerings. You'll be able to automate expense management with your clients, get the data you need, and use that valuable time saved to offer a new service line in spend management advisory. You can learn more about how to build spend management into your CAS practice [here](#).

If you have any questions about any step of this process, please reach out to your account manager. They're here to make this process smooth for both you and your clients, and will be happy to assist with any questions or concerns.

# Ready to help your clients spend smarter?

Reach out to your account manager today  
or visit [\*\*bill.com/for-accountants\*\*](https://bill.com/for-accountants)

