

# The Soraban Client Engagement Program

• Seamless Onboarding

• Higher Engagement

• Client Satisfaction

## Why Choose The Soraban Client Engagement Program?

Our program lets your firm focus on delivering exceptional tax services while we manage client onboarding and engagement.



### Proactive Outreach

We contact your clients to assist with platform access and document submission.



### Streamlined Onboarding

Personalized walkthroughs help clients get set up and confident quickly.



### Higher Adoption Rates

Firms see a 40% boost in questionnaire completion and faster onboarding.

## How We Ensure Seamless Engagement

[Learn More →](#)

- **Approve a client list** for targeted engagement
- **All calls handled** by our U.S.-based team.
- **Local area code** phone number generated for your office
- **Custom voicemail** recorded and left if no connection is made
- **Client callbacks** redirected to your office
- **Client walkthroughs** follow your approved script