

Steps to Make Your Intake Compliance-Ready

1. **Audit Your Current Systems** – Identify where intake data resides, how it's transmitted, and who has access to it.
2. **Identify Gaps** – Look for weak points, such as unsecured forms, untrained staff, or outdated software.
3. **Upgrade to Secure Platforms** – Select technology that incorporates encryption, role-based access, and compliance features.
4. **Train Your Team** – Make sure everyone understands the importance of compliance in every client interaction.
5. **Promote It** – Let prospects know their information is safe from the first moment they contact you.