

Accountants Growth Academy

November 2024

Hunton Park,
Paul Windmill's Road

**Who is your
pricing
champion?**

Your Accountants Growth Academy Next Steps...

Your Firm's Name: RUSSELL + RUSSELL

Today's Date: 27TH JUNE 2024

Your Name: IAN McMONAGLE

Accountability Meeting Date Agreed: 7TH NOVEMBER 2024

smArt goal:

1. HIRE SOMEONE FOR THE BOOKKEEPING TEAM.
2. BUILDING

KPIs

- Accountability check-ins

- Number of goals achieved

Specific; measurable; ambitious; relevant; timed

What might hold you up? How will you overcome it?

1. RESISTENCE FROM KELSEY.
HOLIDAYS. LACK OF TIME.
TOO BUSY DOING OTHER THINGS.
LACK OF TALENT POOL.
RESISTENCE FROM SENIOR/EXPERIENCED PERSON, BEING
MANAGED BY KELSEY.
SALARY IS ALL THAT IS GREATER THAN KELSEY'S
DISCUSSIONS WITH KELSEY. CREATE ENOUGH TIME AND FOCUS
CONSIDER INCREASING KELSEY'S SALARY IN LINE WITH THE NEW
PERSON.

KPIs:

1. TURNAROUND TIME FOR ACCOUNTS THAT WE DO THE BOOKKEEPING FOR.
2. NUMBER OF ADJUSTMENTS AND REALLOCATIONS.
3. INPUT KPI FOR KELSEY: MEETING HELD WITH ONE POC LEADER PER MONTH

Key PREDICTIVE indicators (weekly/monthly)

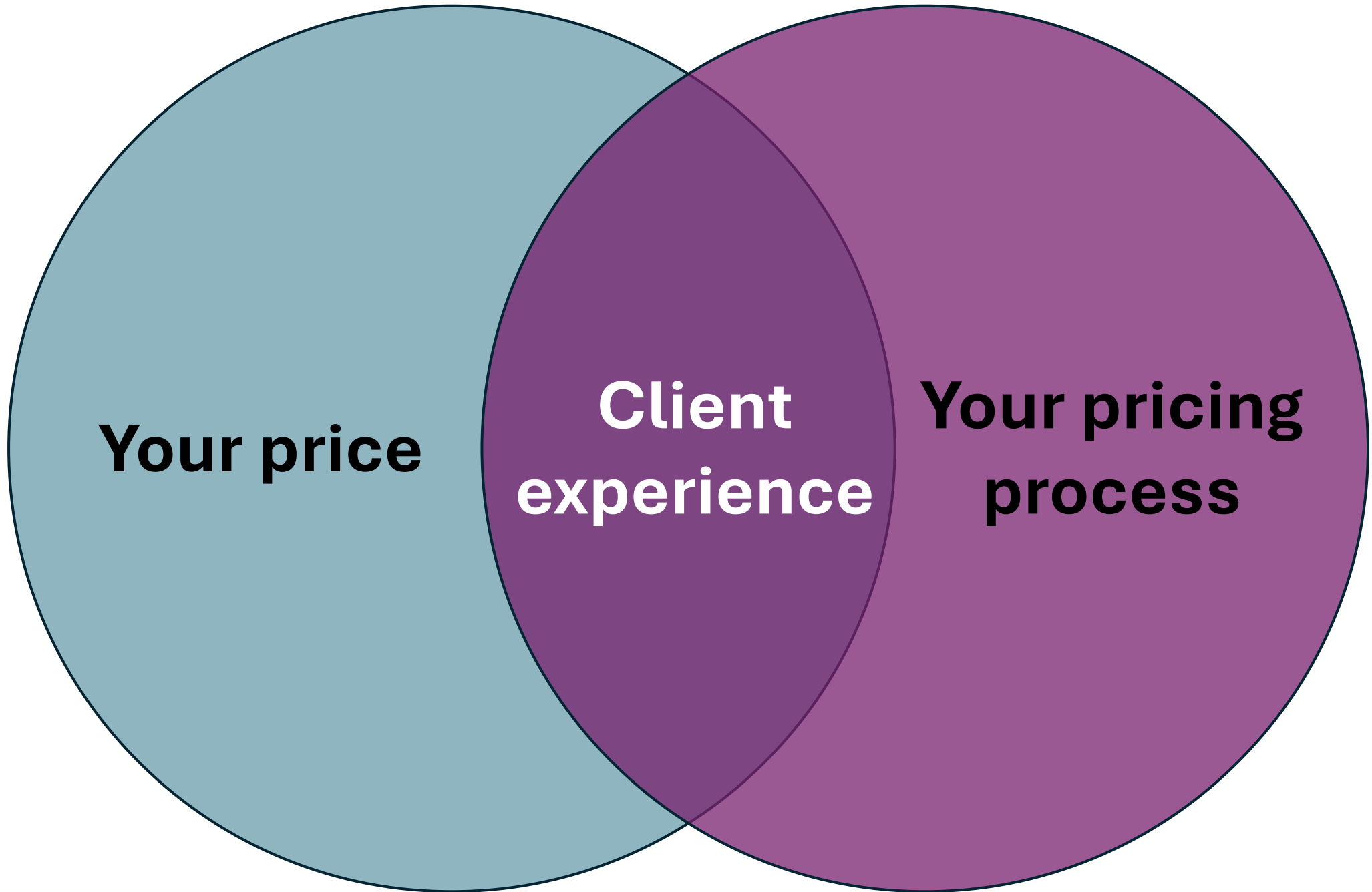
Committed, scripted, diarised next steps:

1. DISCUSSION WITH KELSEY.
JOB ADVERT
INTERVIEWS.
2. DOCUMENT THE APPSTACK WITH THE TEAM.

Time; People; Setting; Emotions; Preceding action



How much?



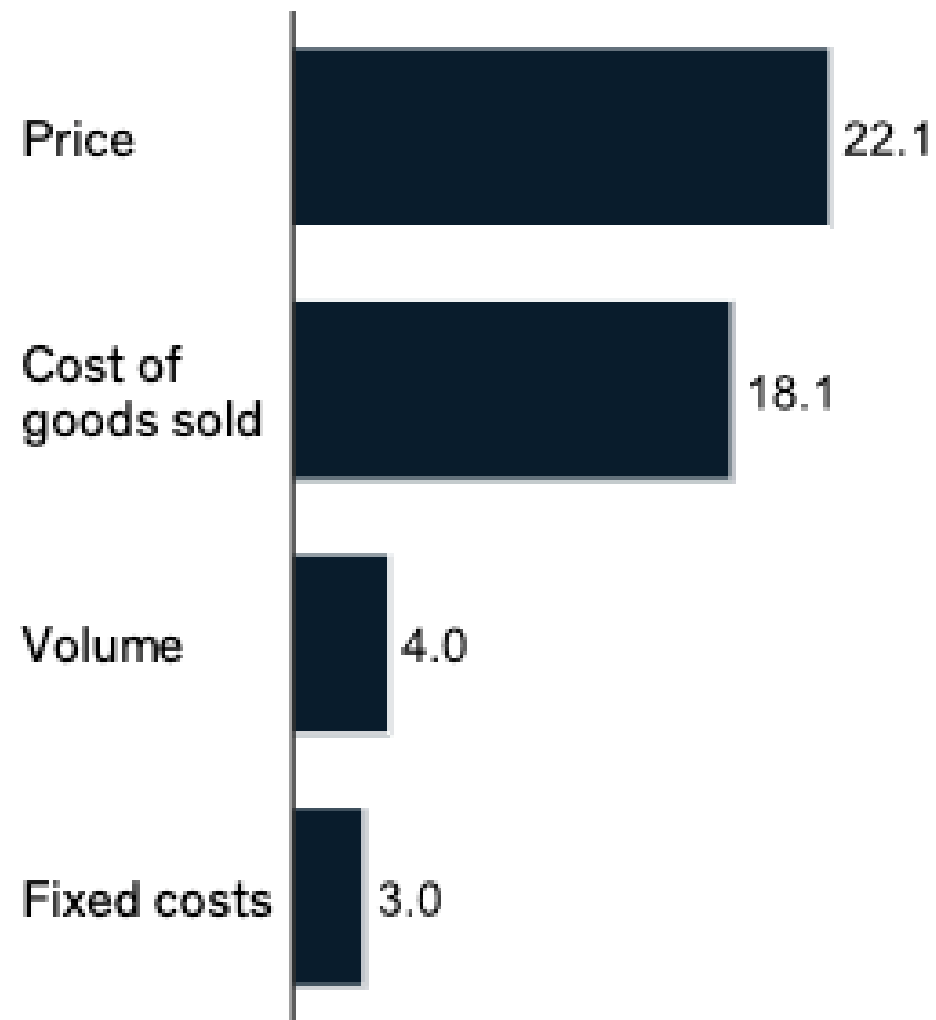
Your price

**Client
experience**

**Your pricing
process**

Improving each lever by 1% affects profit differently

% impact on profit



Pricing elements:

- **Your client experience**
- **Your pricing process**
- **Your price**

Your CHALLENGES

1. How do we improve our internal processes so that we maintain our profit margins?
2. Systematically ensuring a price / service review every year with every client.
3. I really get confused between value pricing and then the more traditional approach of time based - My thoughts are we should aim for 33% profit as a guide.
4. Initial pricing is normal – not bad. The issue is when it comes to raising prices.
5. We should maybe repackage all services as we move proposals onto Socket but this takes time to do 1 by 1 and we will lose out on income compared with doing a blanket increase sooner?
6. We need to look at all Bookkeeping clients separately where we are over on time budgets and increase these separately preferably before other emails so we can sort all in one go.
7. Pricing bookkeeping
8. Team buy-in with implementing price increases
9. Pricing up jobs when clients not on software and we do not have access to records

Your CHALLENGES

10. Deciding on, or finding the right “3 tiers”

11. Consistency and scope creep!

12. Not stopping and re-pricing if job is not what we expected when quoted

13. effectively quote for jobs at the outset

14. better articulate the value

15. too nice to clients

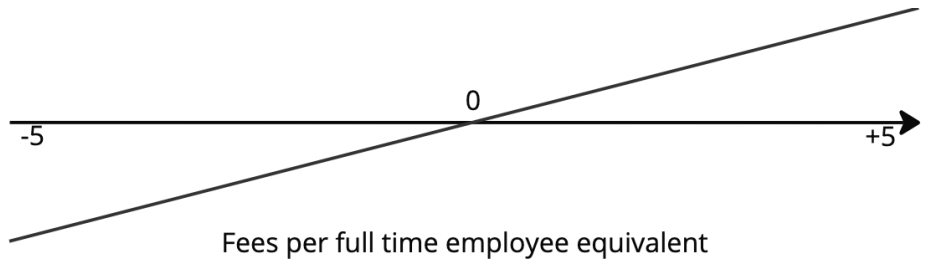
16. we don't pass on costs to avoid confrontation.

17. have difficulty passing on the correct costs/”correct the fee” for clients that we've had for years where we're not recovering, as they are usually surprised.

18. Lack of confidence in communicating value to clients

Your KPIs

- turnaround time
- EWOs - amount of special work
- fees raised
- wins/losses price increases - price decreases
- Our fee as a % of clients turnover
- loosely based on time - book keeping time
- competitors pricing
- monthly FFP
- minimum 5% increase
- invoicing targets
- write offs
- Value billed each week
- pricing reviews carried out each week
- Pricing conversations
- Dext Precision activity
- Number of transactions



Fees per FTEE

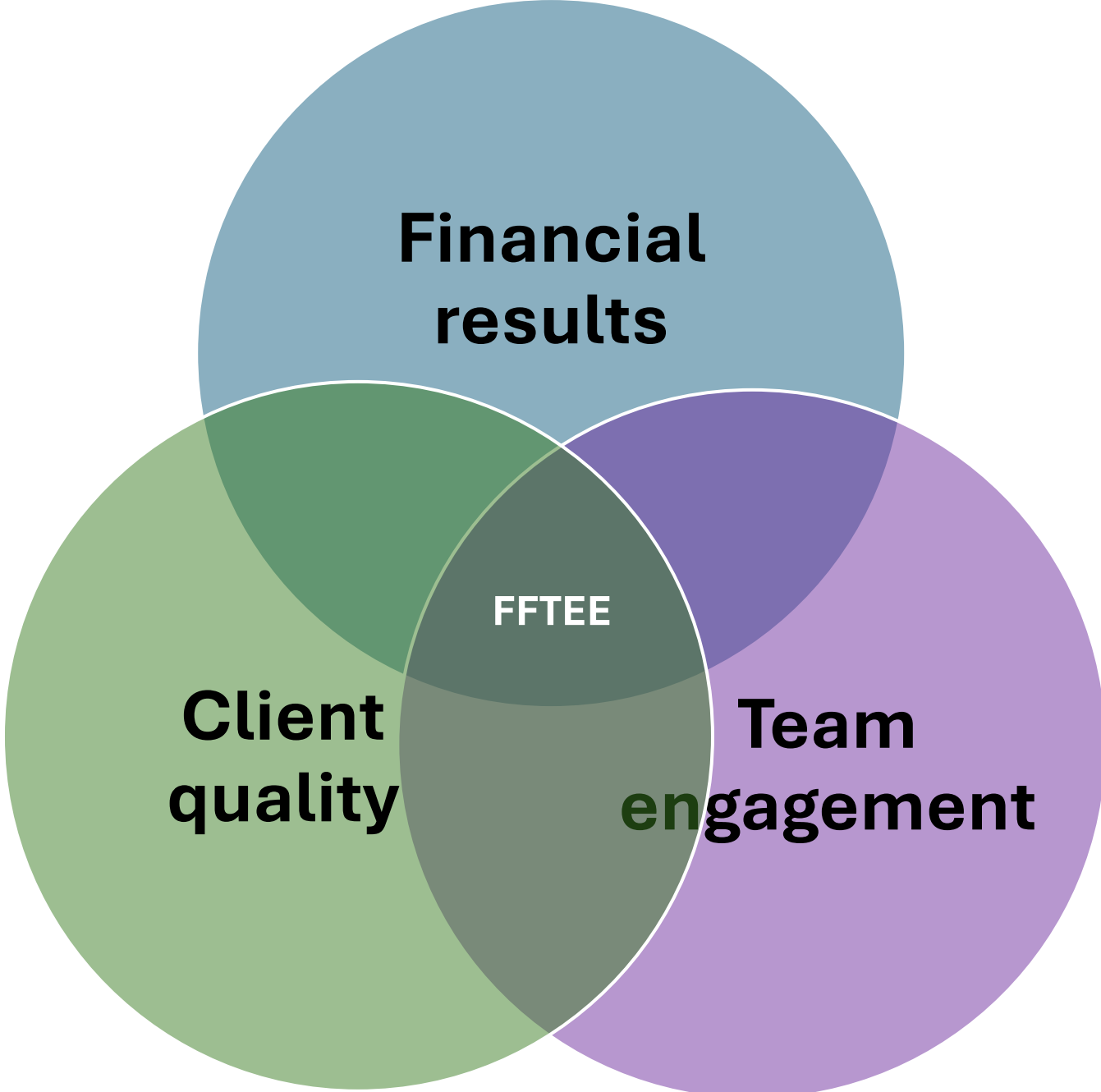
Cash generation & reserves

Sustainable competitive advantage

Enjoyment, pride and impact



**How do you increase your
firm's fees per full time
employee equivalent?**



**Financial
results**

**Client
quality**

**Team
engagement**

FFTEE



5 levers of FFTEE growth

– what one KPI has the biggest impact on your firm's FFTEE growth?



5 levers of FFTEE growth – over 5 years

1. Price/value	+2%	+2%	+2%	+2%	+2%
2. Efficiency	+2%	+2%	+2%	+2%	+2%
3. Client selection/deselection	+2%	+2%	+2%	+2%	+2%
4. Service offering	+2%	+2%	+2%	+2%	+2%
5. Team engagement	+2%	+2%	+2%	+2%	+2%

Your questions

1. How do we prevent **scope-creep**?
2. How do we **capture special work orders** / ensure we bill this to clients?
3. What's the best way to **price year end accounts**? We have fixed prices for a number of services, then man accs are a function from the year end accounts, but how does that get set in other firms?
4. How do firms overcome **client/team concerns about increasing too much**? Easy to say that client doesn't value what you are doing so better off without them, but you still need some of those clients to cover bills etc.
5. What is **the best KPI to use for pricing**? Is it Transaction levels, Time taken or turnover of the client?

Your questions

6. Should we do a blanket increase for anyone who hasn't had a fee increase in last 2 years, and following budget and extra Employers NI and how high a % we go to, should it be 10%, more or less on all our monthly FFP clients?
7. **Timing** - Do we do this in Jan/Feb or wait till April?
8. What's the **best timing** to communicate price increases in different situations?
9. How do other firms **price up jobs when they do not use timesheets** and do not track WIP, scope creep etc.?
10. **How do we build value into compliance**, and convince new clients of the value when they don't want the advisory piece in its own right?

Your questions

11. How do we increase prices consistently better?
- ~~12. Where do you start with the 10 principles, ie could you rank them in importance or impact or to say, start here?~~
13. How do we better cross sell additional services to existing clients?
14. How do you get the team and other partner(s) to follow the system and price scientifically? Not sure if it's a lack of trust in Goproposal or a lack of discipline or lack of leadership on my part?
15. How should we price project work? Do other firms low ball on project work to win clients? E.g. Xero and software projects

Your question...

Where do you start with the 10 principles, ie could you rank them in importance or impact or to say, start here?



Thomas Hobson
(1544–1631)



Pricing principles

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2. Conversation (categories)
3. Minimum fee – standards
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5. Cross sell – WOO helps
6. Bundle
7. Price the client
8. They opt out – you take away
9. Loss aversion – status quo bias
10. Anchoring – top down
11. Pain drives decisions
12. Timing - go early
13. TWR value clarity – EFFing value
14. >1% >2% >3% 3%< client status
15. Measuring to manage (KPIs)
16. Never discount

Pricing principles

10. Anchoring – top down

10. Anchoring

Scope of Work

The reputation and financial strength of the firm reflects the changes the leaders have made in recent years.

Progress towards a more functional equity partner group, the office improvements and a values commitment to '*core purpose*' provide strength and stability.

Your leaders now wish to bring more certainty, confidence and enthusiasm for the vision of the firm. It's vital you maintain an independent firm with a highly engaged team and grow fees from €19m to €32m. Up to a maximum of 150 audit reports, in one location whilst improving the strength-in-depth across the leadership and management groups.

Pricing principles

1. 3 options – price is relative

3 options – price is relative

Pricing options – summary

3 year option 1 – Strategy & accountability support

€ 93,032

3 year option 2 – Strategy & accountability support

€ 63,104

1 year option 3 – Strategic clarity - over 12 months

€ 35,612

Pricing options – detail

3 year option 1 – Strategy & accountability support

Total
€ 93,032

Annual
€ 31,011

4	2024 strategy planning and accountability sessions - LIVE		
2	2025 strategy planning and accountability sessions - LIVE		
4	2026 strategy planning and accountability sessions - LIVE		
10	Strategy action support/accountability Zoom sessions		
1	Strategy report writing support		
12	Mentoring calls - Managing Partner - Zoom sessions		
		<i>Monthly amount</i>	€ 2,584

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3 year option 2 – Strategy & accountability support			
			Total
			€ 63,104
			Annual
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		<i>Monthly amount</i>	€ 1,753

Pricing principles

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7. Price the client

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8. They opt out – you take away

9. Loss aversion – status quo bias



Remarkable
Practice

Strategic leadership with

Scope of Work

The reputation and financial strength of the firm reflects the changes the leaders have made in recent years. Progress towards a more functional equity partner group, the office improvements and a values commitment to 'feel at home at Govers' provide strength and stability. Govers leaders now wish to bring more certainty, confidence and enthusiasm for the vision of the firm by maintaining an independent firm with a highly engaged team growing fees from €19m to €32m, up to 150 audit reports, in one location whilst improving the strength-in-depth across the leadership and management groups.

De reputatie en financiële kracht van het bedrijf weerspiegelen de veranderingen die de leiders de afgelopen jaren hebben doorgevoerd. Vooruitgang in de richting van een meer functionele partnergroep, de kantoorverbeteringen en een waardenverbintenis om 'zich thuis te voelen bij Govers' zorgen voor kracht en stabiliteit. De leiders van de gouverneurs willen nu meer zekerheid, vertrouwen en enthousiasme brengen voor de visie van het bedrijf door een onafhankelijk bedrijf in stand te houden met een zeer betrokken team, dat de honoraria verhoogt van € 19 miljoen naar € 32 miljoen, tot 150 auditrapporten, op één locatie, terwijl de prestaties worden verbeterd. diepgaande kracht binnen de leiderschaps- en managementgroepen.

Challenges

Challenges

Challenge 1	Strategische duidelijkheid en toewijding aan strategische actie zijn moeilijk omdat de hoeveelheid werk voor de klant de tijd en aandacht van de aandelenpartners domineert	Strategic clarity and commitment to strategic action is hard because the volume of client work dominates the equity partners time and attention
Challenge 2	Het opbouwen van leiderschap en managementkracht binnen de bredere partnergroep is nodig om de toekomstige groei en stabiliteit van het bedrijf te stimuleren en de levensdoelen van de huidige aandelenpartners te helpen bereiken.	Building leadership and management strength across the wider partner group is needed to fuel the future growth and stability of the firm and help achieve the life goals of the current equity partners
Challenge 3	Volg een proces om het aantal laagwaardige klanten terug te dringen om capaciteit binnen het bedrijf vrij te maken en tegelijkertijd de vergoedingen en winsten te laten groeien	Follow through on a process for reducing the number of low grade clients to free capacity across the firm whilst also growing fees and profits
Challenge 4	Geef het bredere team een duidelijke, beknopte en motiverende visie op hun toekomst, die de beste mensen behoudt en meer hoogwaardige mensen aanspreekt	Provide the broader team with a clear, concise and motivating vision for their future that retains the best people and appeals to more high quality people

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1 year option 3 – Strategic clarity - over 12 months € 35,612

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Note: Prices include travel and overnight stays.

What other firm leaders have to say...

Transforming results is the goal with every firm we work with. And although every firm is unique in their particular circumstances, challenges and opportunities every firm has people and numbers work at their core. Here are a couple of comments from leaders we've worked with...



Adam Hickie
Partner - Lucraft, Hodgson & Dawes

"Working with Paul over the last few years has been an absolute game changer. For the first few years of being a partner I was firefighting.

Most recently we have been developing a new strategy for the whole business; taking us from three sole traders with a shared overhead to a cohesive business with a shared purpose. It feels great!

By using the strategy process with Doug and Paul we are seeing how we can shape a better business and a better life for our team, our clients and the firm as a whole. Never before have we achieved such clarity and agreement about where we are going and what sort of work we want the firm to do."



Subarna Banerjee
Managing Partner - UHY Hacker Young, Chairman UHY International

"Being new to the role of Managing Partner I was determined to be clear on where we were taking the firm.

This required clear thinking and more than anything else getting committed engagement from ExCo and the wider team was essential.

I'm pleased to say that all 255 team members now knows what the firm's vision is, and what the firm's core values and behaviour standards are.

Even more important we are starting to build a real sense of focus on the firm's core purpose - it really is starting to come to life in every meeting and every aspect of the business."

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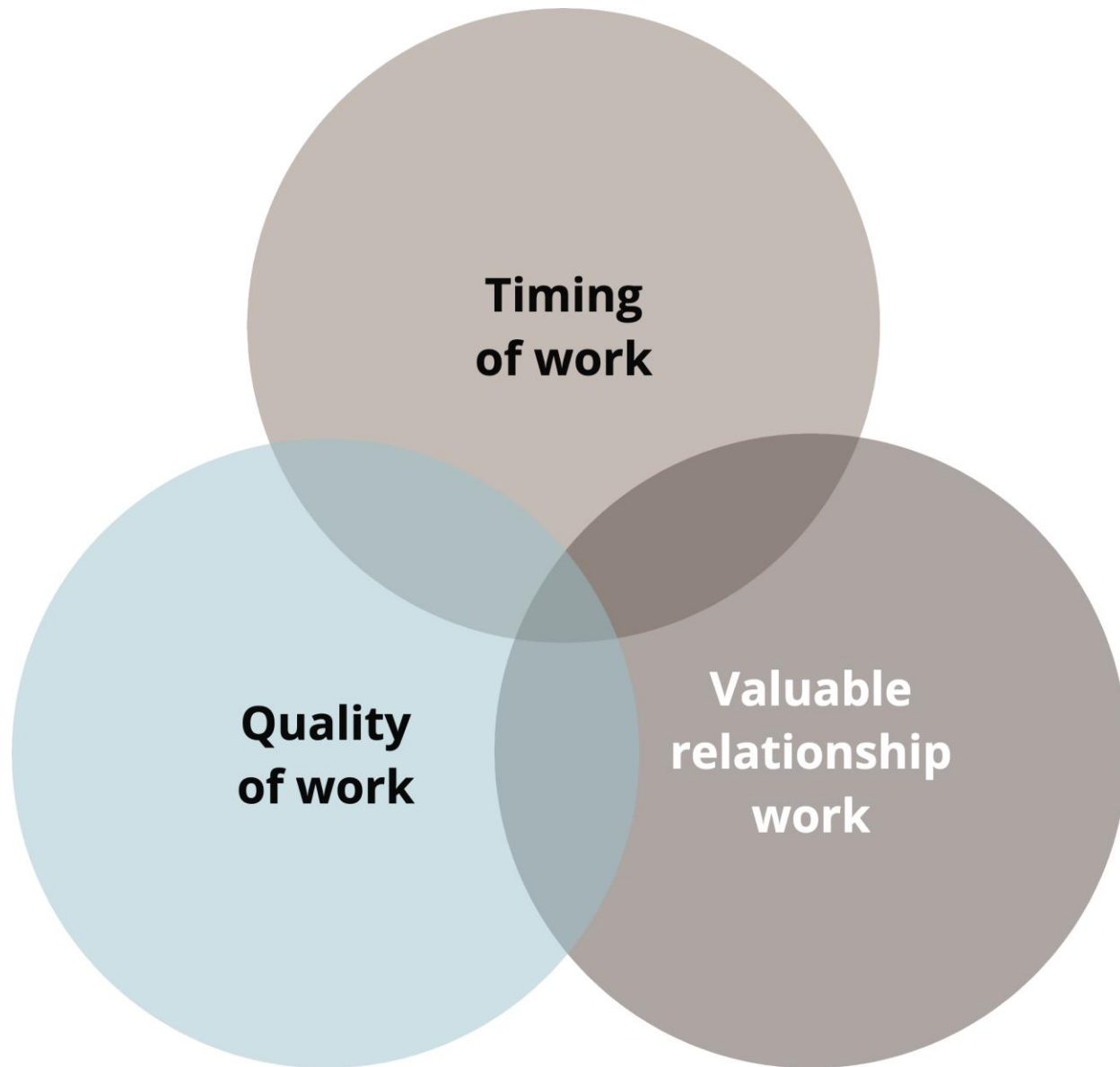
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EFF value



**Timing
of work**

**Quality
of work**

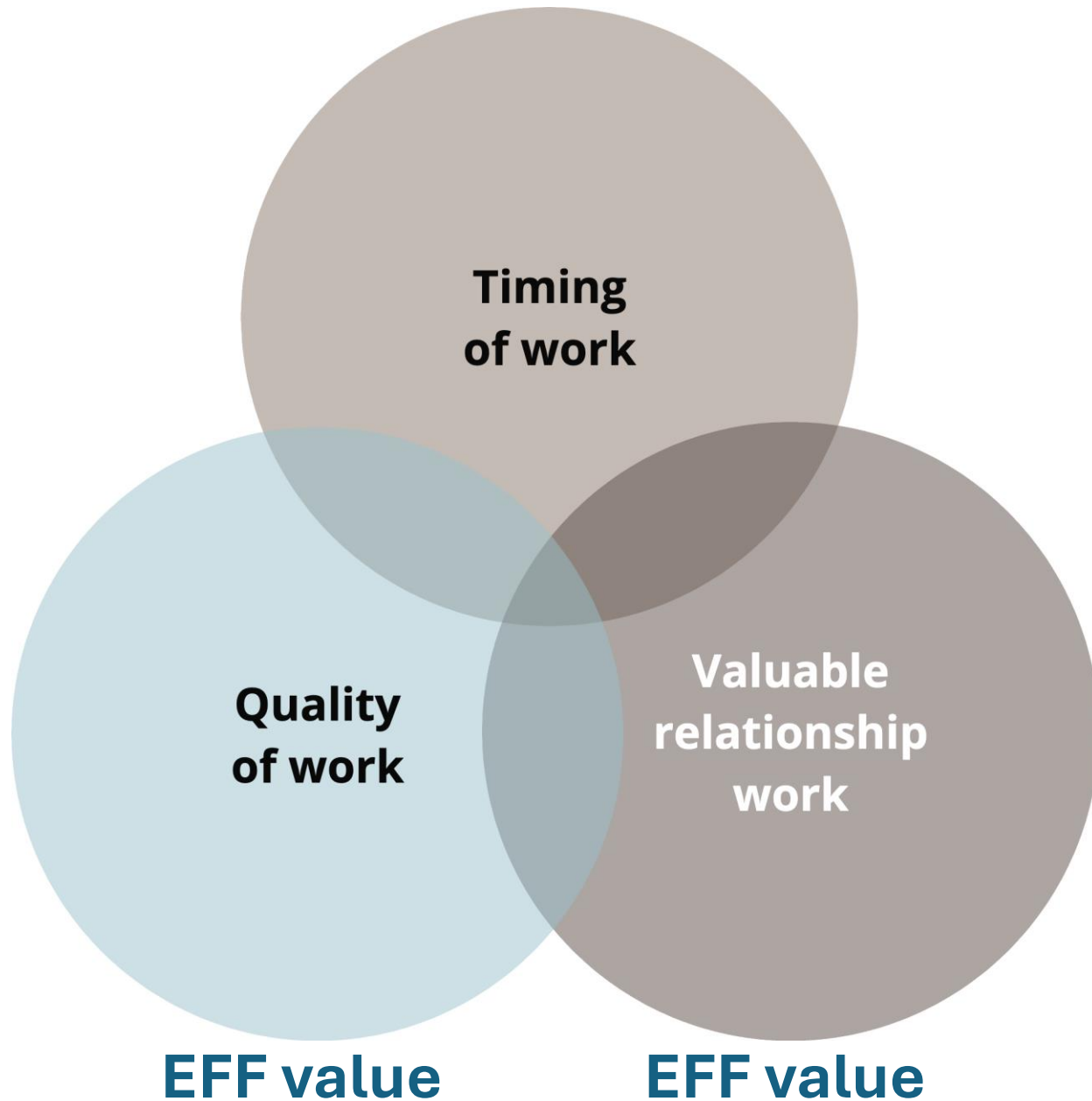
**Valuable
relationship
work**

EFF value

EFF value

**How
much?**

EFF value



How much?

Minimum fee

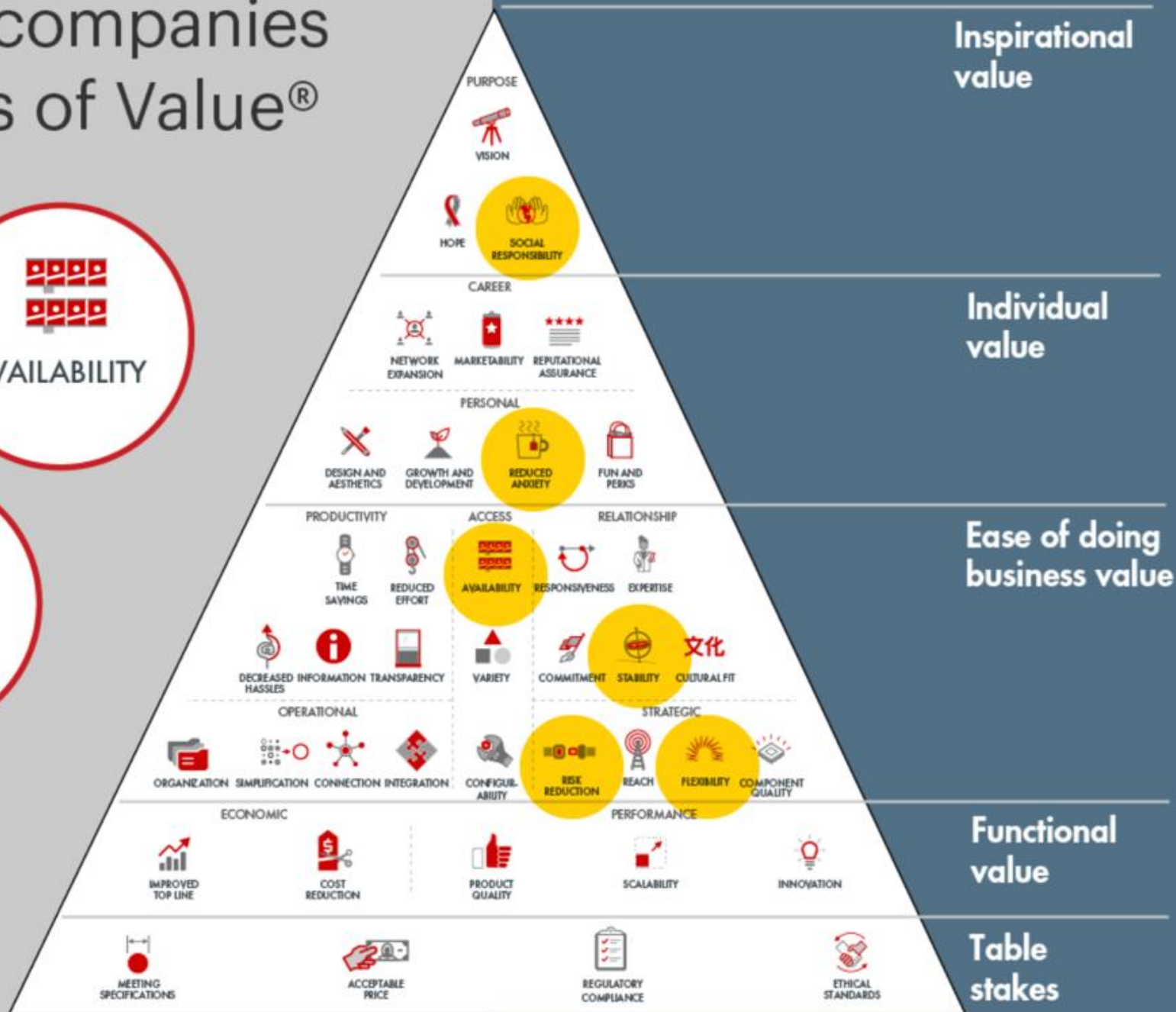
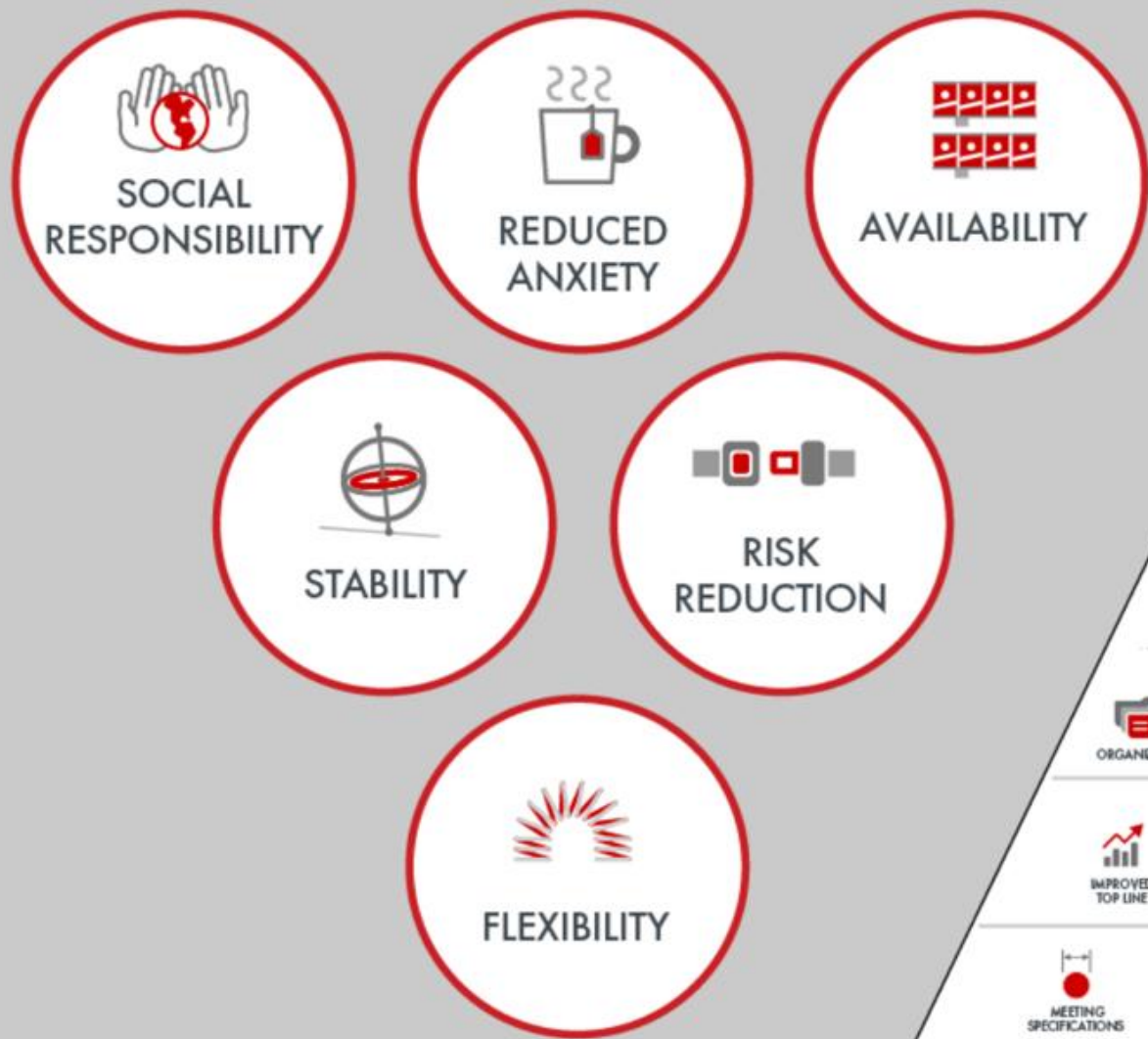
- Partner – manager

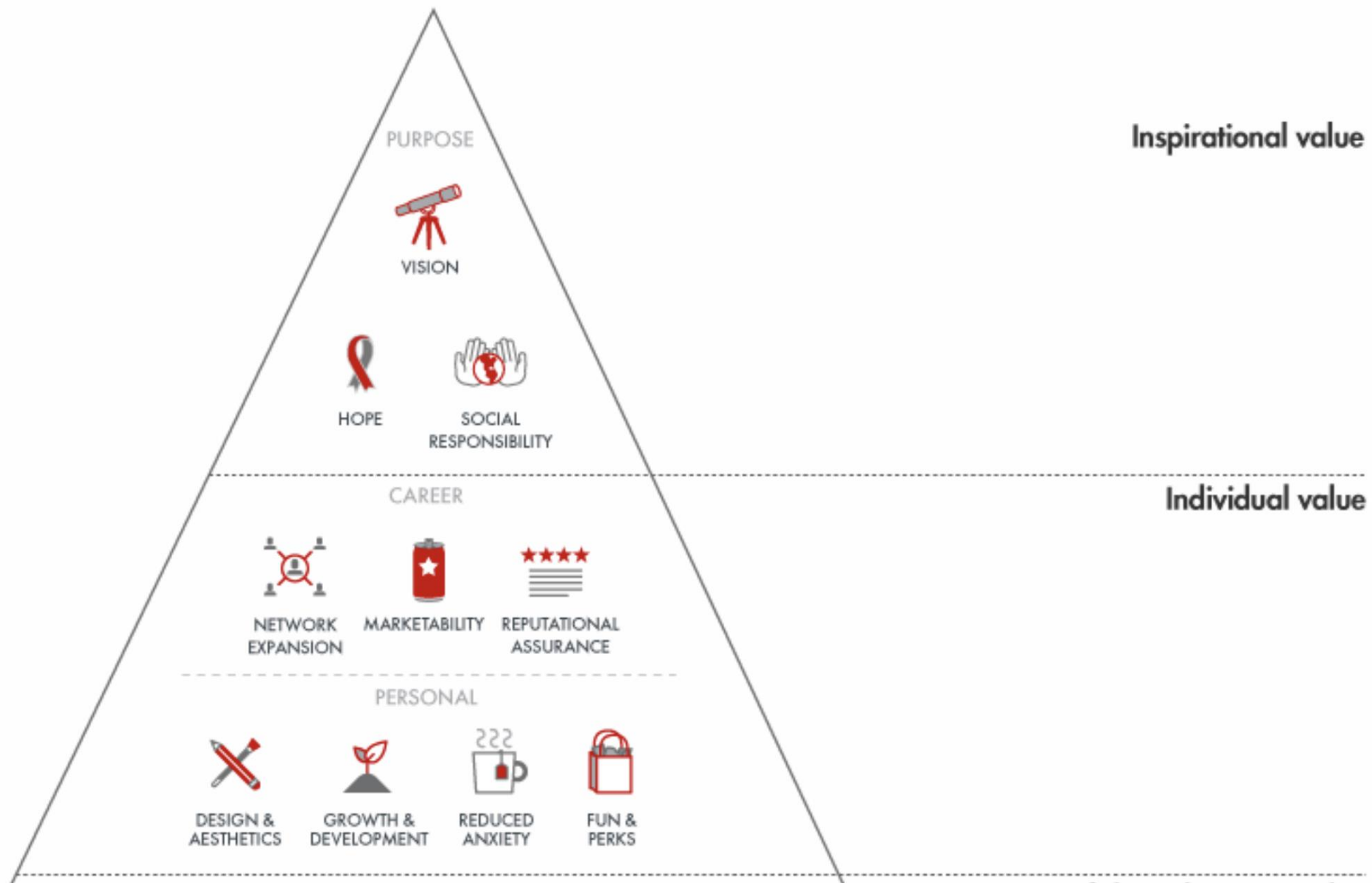
Describe the client

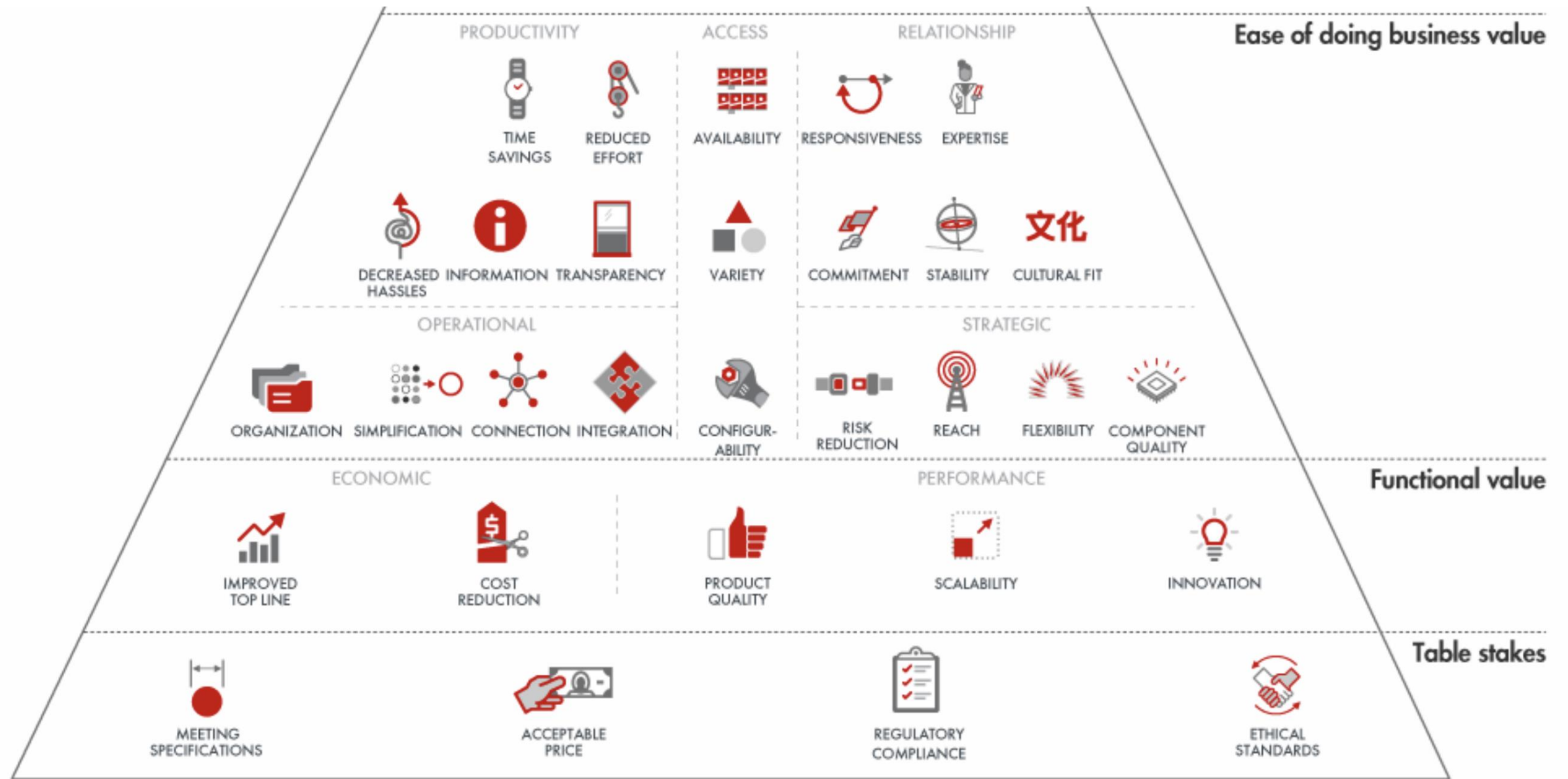
3-options

- TQR

This is the time for B2B companies to focus on six Elements of Value[®]







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GUIDELINES: Complete this simple scorecard and you'll get your **Client Quality Score from -10 to +10** show up in cell G10. Start by estimating the number of business clients you have now in cell G3. Then estimate how this number of clients breaks down into the 4 categories and add your best-guess number in cells F5-8. The red amber and green scores in cells G5-8 then help sign-post next steps you could/should be taking.

Total number of business clients?				0					
CLIENT	FEE	SCORE	Your client numbers	Your client quality score	Total fee value	Suggested response			
GOOD	GOOD	10	0	0	£ -	Client care maintenance; Pricing for profit maintenance; Avoid complacency and indifference			
GOOD	PROBLEM	5	0	0	£ -	Client care maintenance; Improve pricing for profit and perceived value			
PROBLEM	GOOD	-5	0	0	£ -	Client behaviour change management ; Pricing for profit maintenance; possible client exit			
PROBLEM	PROBLEM	-10	0	0	£ -	Client behaviour change management; Improve pricing for profit; probable client exit			
			0		£ -				
Your firm's Client Quality score				#DIV/0!	<i>"Please remember, behind every number there is a name or list of names" - Paul Shrimpling</i>				
IMPORTANT: Cells G3 and G10 should be the same number. If you wish add in the value of fees for each of the 4 categories of client in cells H5-8.									

Example definition of good	Example criteria	Possible responses
Definition of a GOOD client	Respectful; responsive; quality records; buys multiple services	If disrespectful then client exit management/timing; If unresponsive then functional system change with client and/or fee increase; If quality of records low then work with client on system change; if not buying enough services work on 3-option pricing/value process
Definition of a GOOD fee	More than 1% of client turnover; Exceeds your firm's minimum fee;	If less than 1% of client turnover then work on pricing and value equation and processes; IF not yet a

GUIDELINES: Complete this simple scorecard and you'll get your **Client Quality Score from -10 to +10** show up in cell G9. Start by estimating the number of business clients you have now in cell G10. Then estimate how this number of clients breaks down into the 4 categories and add your best-guess number in cells F5-8. The red amber and green scores in cells G5-8 then help sign-post next steps you could/should be taking.

Total number of business clients?				450
CLIENT	FEE	SCORE	Your client numbers	Your client quality score
GOOD	GOOD	10	75	750
GOOD	PROBLEM	5	300	1500
PROBLEM	GOOD	-5	75	-375
PROBLEM	PROBLEM	-10	0	0
			450	
Your firm's Client Quality score				4.2

IMPORTANT: Cells G3 and G9 should be the same number.

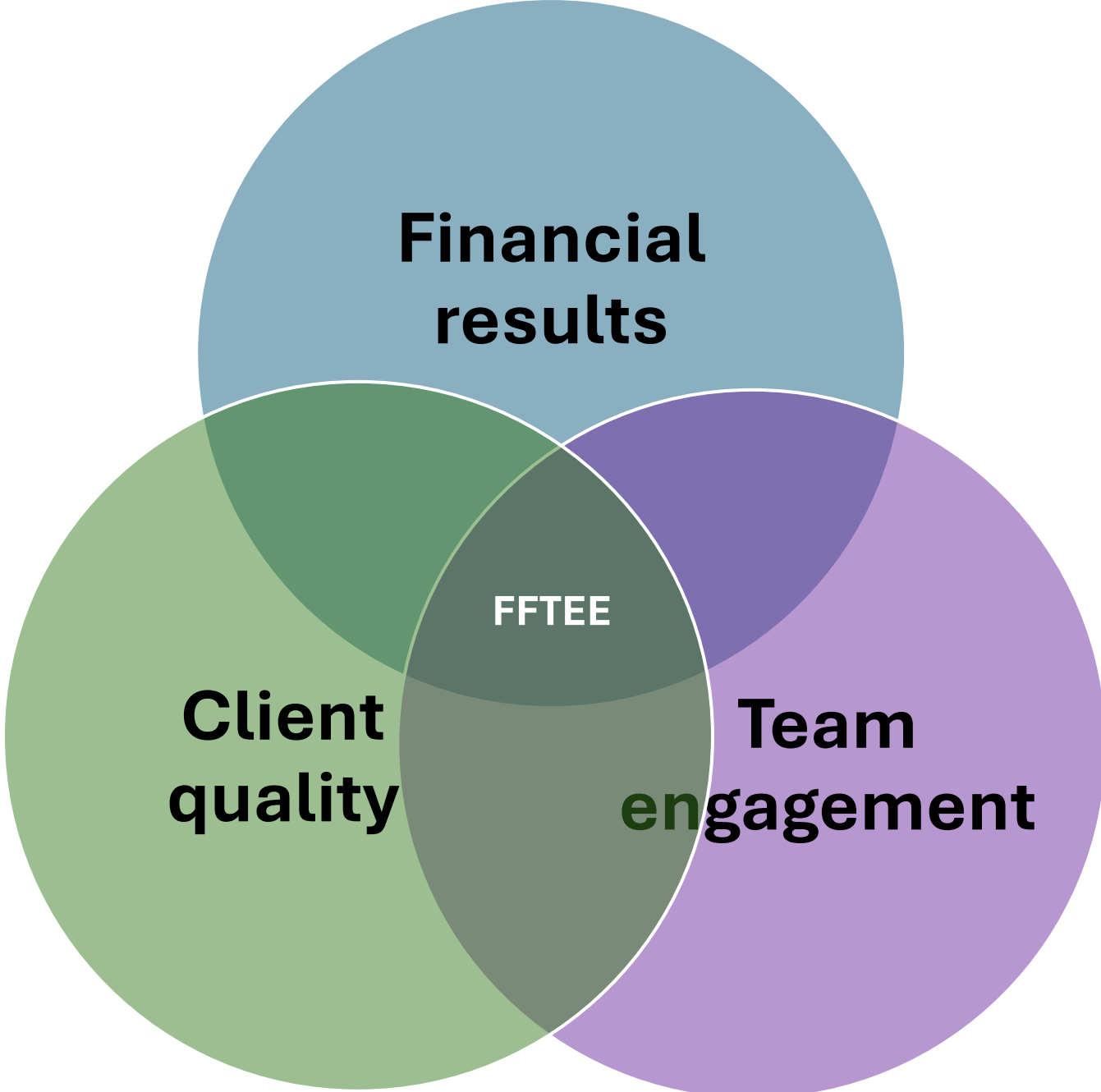
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17. Two-meeting default

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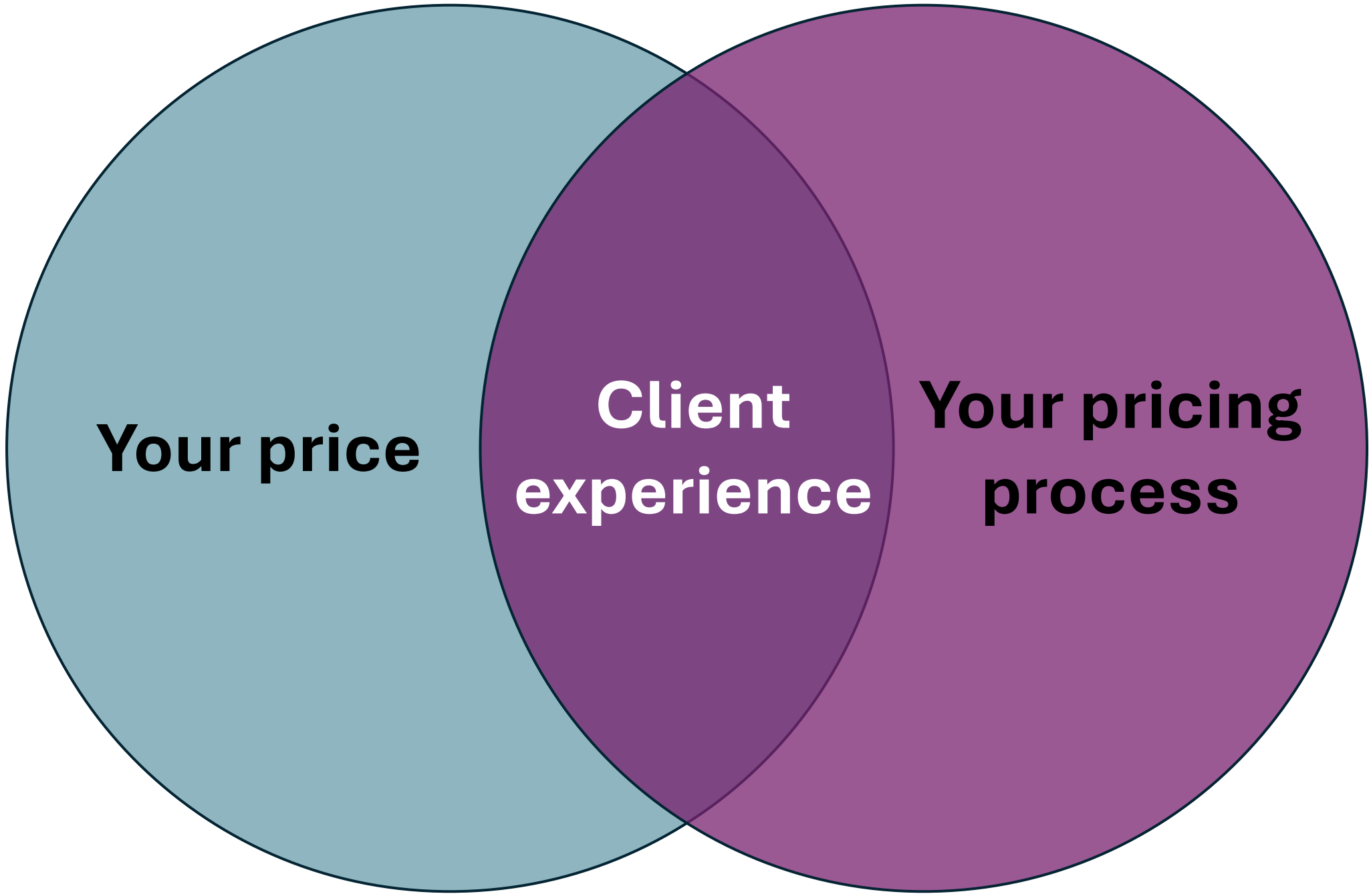


**Financial
results**

**Client
quality**

**Team
engagement**

FFTEE



Your price

**Client
experience**

**Your pricing
process**

Introduction

...TIME TO UNLOCK
LONG-TERM
SUCCESS IN YOUR
ACCOUNTANCY
FIRM



Strategic Health Question 3

WHAT DO YOU
AND YOUR FIRM
STAND FOR?



Strategic Health Question 2

WHAT DOES
SUCCESS
LOOK LIKE
AT YOUR
FIRM?



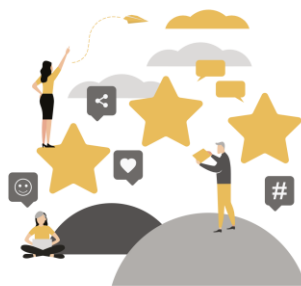
Strategic Health Question 4

HOW MUST
YOU AND YOUR
COLLEAGUES
BEHAVE?



Strategic Health Question 5

WHAT MATTERS
MOST TO YOUR
CLIENTS?



Strategic Health Question 7

WHAT'S
CHALLENGING
YOUR FIRM?



GO LONG, THINK
BIGGER



Strategic Health Question 8

WHAT IS YOUR
WITHOUT-FAIL
FOCUS THIS
QUARTER?



Pricing KPIs – in use now

- turnaround time
- EWOs - amount of special work
- fees raised
- wins/losses price increases - price decreases
- Our fee as a % of clients turnover
- loosely based on time - book keeping time
- competitors pricing
- monthly FFP
- minimum 5% increase
- invoicing targets
- write offs
- Value billed each week
- pricing reviews carried out each week
- Pricing conversations
- Dext Precision activity
- Number of transactions

YOUR FIRM'S FUTURE?





ChatGPT view – who?

What ChatGPT thinks about your firm from analysing your website

This is an accountancy firm focused on supporting SMEs with financial management, business growth, and achieving long-term goals. They emphasize a relationship-based approach, offering not just financial expertise but also strategic guidance to help clients reach their ambitions. Their recent work includes a focus on digital transformations and compliance with evolving tax regulations.

2025 Growth Academy Sessions

- 13th February -
- 12th June
- 23rd October

23:38

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Your Strategic Health Diagnostic Results

Paul, Thank you for taking the **Strategic Health Diagnostic** for Rpl

Your full report has been emailed to paul@remarkablepractice.com. [Change email address](#)

