



# How to start and grow your practice playbook

Insights and tips from your peers to help you build a thriving practice





# Introduction

**Starting your own accountancy or bookkeeping practice can be daunting, but it is also one of the most rewarding career moves you could make. Everyone will have a different reason for wanting to venture out on their own, from wanting more work/life balance to creating a firm you can pass down.**



Accountants and bookkeepers serve as navigators, steering business owners through the complexities of setting up efficient accounting systems, advising on appropriate VAT handling, payroll and personal tax returns and suggesting the best business structures to capitalise on tax advantages.

However, with the current economic climate in the UK and continuing post-COVID recovery, accountants and bookkeepers play a crucial role in providing support beyond mere compliance and helping businesses remain resilient. Small businesses play a vital role in the UK economy and are the backbone of growth. Accountants and bookkeepers strengthen the economy and are at the forefront of boosting success for small businesses.

At QuickBooks, we know that accountants and bookkeepers are the unsung heroes. Our research shows that small businesses are seeking more support. The rising cost of living has led **43% of small businesses with accountants to seek more support with forecasting so that they can plan.**

With more people becoming entrepreneurs, the need for accountants/bookkeepers is rising. That's why we've partnered with accountants to help you achieve success with your practice.



# Contents

**1**

**The mindset  
of the modern  
accountant**

**2**

**Find your  
niche and  
service offerings**

**3**

**What your  
clients are  
looking for**

**4**

**What you  
need to know  
about pricing**

**5**

**Going down  
the strategic  
advisory route**

**6**

**Finding your  
competitive edge  
and promoting  
your brand**

**7**

**How to use social  
media to maximise  
your practice's  
potential**

**8**

**Getting  
clients to  
write reviews**

**9**

**Lift off  
lessons**



# The mindset of the modern accountant



## Lucy Cohen

Co-founder and CEO of Mazuma, business coach & author of *Forget the First Million: Detox your approach to finance. Build a better business*

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The primary motivation for starting your practice often stems from believing you can do things better. This could mean offering something unique to the market or improving your quality of life.

Too often, accountants and bookkeepers venture out and want to replace the money they used to make at their jobs. The focus is on bringing in the fees they need and forgetting about all the other costs incurred when running a business. If you start this way, you already operate from a fixed mindset. Instead, adopt a growth mindset and view this as an opportunity to improve and innovate. Don't simply replicate what you did before. Focus on growth, opportunity, and commercial success.

## Embracing a growth mindset

A growth mindset is crucial for anyone looking to make this transition. It involves being aware of and actively working to change one's thought patterns that limit growth. This means understanding that skills and knowledge can be developed with effort and learning and facing challenges with a perspective that looks for opportunities to improve and expand one's abilities.

The initial step in developing a growth mindset is to increase self-awareness of one's thought patterns. On average, we have between 50,000 and 100,000 thoughts per day, most of which are repeated from previous days. It's essential to start by identifying what I think about every day.

Moving from being an accountant or bookkeeper to running a business requires a significant shift in thinking. It's not just about being good at your job technically; it's about understanding and embracing the mindset of a business owner from the very beginning.



Embracing roles in sales, marketing, and other non-technical areas can be daunting. It requires stepping out of your comfort zone and doing things that might not come naturally, like following up on sales proposals multiple times.

A growth mindset fuels curiosity, resilience, and the willingness to experiment and learn from failures. Without it, opportunities are missed, and the potential for success is limited. Embracing a growth mindset is essential for pushing through challenges, connecting with others, and keeping your business dynamic and evolving.

The consequences of neglecting a growth mindset can range from stagnation to outright regression. When your income does not keep up with inflation, you'll fall behind in the economy. The same can be said about your mindset.

As the accounting sector continues to evolve, accountants and bookkeepers have the opportunity to enhance their chances of success. By changing your thinking, you're more likely to have a rewarding career filled with growth and satisfaction.



### Never forget why you started

This foundational motivation will help you persevere through tough times and make decisions that align with your core reasons for becoming an entrepreneur. It can be challenging, but saying “no” keeps you from drowning in work that pulls you away from your purpose. Remember, your time will be hijacked by others’ demands, and suddenly, you’ve lost sight of why you started your business.

### Case study: A runner’s revelation

I worked with an accountant recently who stopped running because he couldn’t find the time. When we broke it down, it was clear the only thing stopping those runs was him logging onto the computer first thing in the mornings. We tried a new plan: running first, then work. And guess what? It was a game-changer. This mindset shift allowed him to rediscover his love for running and remember why flexibility and balance were his initial motivators for going solo.



# Finding your niche and service offerings

The key to thriving in today's competitive market is to match your services with your clients' needs. Small businesses often face challenges such as streamlining processes, reducing costs, and complying with complicated regulations.

Setting yourself up as a beacon of guidance and providing the expertise they need can broaden your service range beyond the basics. By matching your services with your clients' requirements and difficulties, you're supporting their progress and paving the way for the success of your practice. The impact? 75% of small business owners feel more confident about their future success.



**Bev Flanagan**

Business coach & Director  
of Bev Flanagan Financial

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## Elevating your practice with partnership strategies

Transforming your accounting or bookkeeping venture into a holistic hub for your clients is less about stretching yourself thin and more about smart collaborations. Here's how to leverage outsourcing and partnerships to broaden your offerings without diluting your expertise:

The old myth that you need to handle every service in-house is just that—a myth. If tackling payroll or end-of-year finances feels like a slog, why not outsource it? This way, you position yourself as a versatile, all-in-one accounts department. Adding complementary services can enhance your value proposition significantly.

## The strategic advantage of niching in accounting

Finding and defining your niche can be the key to unlocking unprecedented growth and establishing yourself as an industry authority. The common fear that niching down might limit your market or opportunities is, in reality, a misconception. On the contrary, specialising in a specific sector can propel your reach and impact beyond being a jack-of-all trades. **Here's why and how adopting a niche strategy can be a game-changer for your accounting practice.**



**Bev Flanagan**

Business coach & Director  
of Bev Flanagan Financial



### Why niching works

My experience with niching began when I focused my practice on trades and construction. Specialising in this sector allowed me to tap into a community where word-of-mouth and referrals are rampant. By becoming known within this network, my practice saw substantial growth, fueled by my expertise in accounting and my in-depth knowledge of the industry's specific tools and software.



### Adding value beyond numbers

One of the most significant benefits of niching down is the ability to offer tailored, high-value services that transcend traditional accounting tasks. For instance you learn about and then advise on industry-specific CRM systems or operational software. This not only enhances the client experience but also elevates your role to an indispensable part of their business. It's about being seen as a specialist who can navigate that niche's unique challenges and opportunities, offering insights that can genuinely transform a client's business operations.



### Finding your niche: Tips for accountants and bookkeepers

Starting from scratch presents a unique opportunity to embed niche specialisation into your business model from day one. While the allure of trending sectors (like influencer marketing) might be tempting, it's vital to base your niche choice on personal interest and long-term sustainability rather than fleeting trends. Passion for your chosen field is non-negotiable; without it, serving your niche can become a challenging task rather than a fulfilling career.



### The Virtual Finance Director model

Niching also paved the way for my transition into offering Virtual Finance Director (VFD) services—a role commanding substantially higher fees than standard accounting and bookkeeping services. This shift allowed me to provide strategic, high-impact advice directly relevant to my clients' businesses. In becoming deeply embedded in the trades and construction sector, I could offer guidance and services that clients were willing to pay premium prices for.





## Sam Gooding

Partner at Gooding Accounts



It's normal to see people starting and taking whatever clients they can get because they're desperate for the work and want to hit the ground running. In my case, our focus on construction developed and matured over time.

Today, most of our clients are construction or property-based, and people get referred to, so it's been very successful for us and is a great driver for success for any accountancy firm - you're seen as the expert in that field rather than a jack-of-all-trades. Even though we are based in Wiltshire, being niche-focused means we work with clients in London, so it's undoubtedly helped grow our business over the ten years we've been going.

In the early stages of any business, particularly in service industries like accountancy, there's often a rush to secure as much work as possible. It's normal to see people starting out and taking whatever clients they can get because they're desperate for the job and want to hit the ground running. It's understandable to see a need to establish a foothold in the market and generate a steady revenue stream. Businesses may not be strategic enough to build out their client base. This was certainly the case for us, as we initially took on a wide range of clients, irrespective of their industry.

But over time, our focus changed, and today, the majority of our clients are construction or property-based.

### **People get referred to us because of our expertise, and it's been a great driver for our success.**

Despite being based in Wiltshire, our niche focus has attracted clients from major hubs like London, illustrating that expertise can transcend geographical boundaries. This approach has contributed to our firm's growth and sustainability over the past decade.

Our journey from taking any client that came our way to becoming a specialised accountancy firm serving the construction and property sectors illustrates a strategic pivot. We're seen as experts in a specific field rather than jacks of all trades, and it proves that having a niche sets us apart in a crowded marketplace—and it can do the same for any firm."



# What your clients are looking for



**Abul Nurujjaman**

Managing Director at Taj Accountants



It's important to understand that clients' expectations extend beyond the mere delivery of your services. Clients will look for signs of reliability and trustworthiness as well as efficiency and professionalism. This is true regardless of the size of the practice.

Ensuring full compliance with regulatory standards is more important than completing projects within set deadlines. Quality work will fuel referrals and help expand your client base. To succeed, be professional, do your research, and understand every aspect of your business operations. The early stages of starting an accountancy firm can be challenging, especially if you have limited resources. You'll need a comprehensive approach, blending compliance and business knowledge with your accounting expertise."







## **Kamil Skeikh FCA BSC (Econ)**

Director and Chartered Accountant at Honest Advisory



When you think about what your clients need from you, this will change all the time depending on the type of client you've got. Being agile and adapting my advice to the type of client I'm currently working with will probably be the most essential skills you'll need.

It's important to think about and truly understand things from their perspective. The advice you give and the value you add must be helpful and something they can apply to their business. This will allow your clients to trust you as their reliable advisor.

For the most part, traditional accounting moves from A to Z, and we sometimes accept that this is the box that we need to work within. However, we aim to provide value inside and outside this box as best as we can. Since launching in 2016, my practice has evolved into a more customer-centric business over the last six years.



## **We can put ourselves in our clients' shoes, understand their business ambitions and struggles, and give them the advice and value they need.**

A huge part of our success is that we've zeroed into knowing our why and the values that drive our work - it's been crucial to running our practice. It's a litmus test we use whenever we discuss engaging with any client.

To put it simply, we only work with some clients, not all. This means that if we determine that the work is not a good fit during our onboarding meeting, we will decline it.

Another way of looking at it is to see whether the client can work within our value system and how we want to work with them. Filtering early can be effective in saving us valuable time and avoiding lengthy conversations."



# What you need to know about pricing

When you launch your practice, one of the most important things you'll need to do is set your pricing strategy. You'll have three different options to choose from, and depending on the clients you work with and the nature of your services, you may choose to combine these options.



## Three ways you can charge:

- Fixed fees can be an attractive way to charge and probably the most common, but **be flexible and change the pricing according to the level of service**. Clients want transparency, honesty, and fairness.
- Hourly fees work well when the work takes longer than expected or doesn't require significant effort, such as writing letters. It's crucial to **communicate as clearly and early as possible** to estimate the hours needed to complete the job.
- Retainers are most suitable for monthly services such as payroll, bookkeeping, or VAT returns. Always **ensure pricing aligns with your experience and value** you bring.





## Bev Flanagan

Business coach & Director  
of Bev Flanagan Financial

## Navigating pricing with confidence

Setting your prices is a critical step that requires thorough research and a strategic approach.

Here are a few rules to follow:

- Investigate **standard rates within your area**, as geographical differences can impact pricing expectations.
- Establish **fixed and minimum fees** for your services and stand firm on them.
- Avoid the temptation to offer discounts, as this can undermine the perceived value of your services. Instead, **focus on articulating the value you provide** to justify your pricing.
- You won't always be the cheapest, but **cheap prices sometimes send the wrong message**.

## Embrace your value

Never underestimate your worth. When you have confidence in your abilities, you are less likely to underprice your services, which can harm profitability and give potential clients a negative impression.

It's easy for us in the accounting and bookkeeping field to overlook the immense value we bring to our clients. Quick fixes for us might be monumental challenges for them.

**Remember, the efficiency and knowledge you offer result from years of experience and skill development.**

When you save a client from a potential mishap, it's not just another task ticked off the list; it's a significant problem solved and worth recognising and valuing.

The accounting community is known for its collaborative spirit. Don't be afraid to contact peers or a business coach specialising in accounting who can offer invaluable insights into pricing strategies and help you navigate the early stages of establishing your practice.

Sometimes, this will require a mindset shift, especially in the beginning. It's natural to want to build your client base quickly, but often, accountants and bookkeepers speak about their client base and not about their profitability; it's all about being profitable.





## Sam Gooding

Partner at Gooding Accounts



Over the past 10 years, our firm has grown significantly, largely because I delegated the financial aspects to another team member. My approach to pricing was too generous when I began.

This really underscores the importance of setting firm prices from the beginning. Maintaining strong pricing is essential and if potential clients are reluctant to meet your rates, they're probably not a good fit for your services. It's a critical practice for anyone starting out and I would highly recommend not taking work at any price just for the sake of it."



## Lucy Cohen

Co-founder and CEO of Mazuma, business coach



Discussing money shouldn't be taboo. Somehow, it's become this hush-hush thing, especially among accountants and bookkeepers. The truth? Money is not a dirty word. It's what fuels the business and our lives.

Getting comfortable talking about rates, fees, and financial goals with clients is critical if you're in this to make a decent living. Feeling guilty about wanting to earn more or discussing finances will only keep you locked in a mindset where you won't see the value you bring. Money talks and it's high time we all got fluent."





# Going down the strategic advisory route

The business landscape has shifted, with clients increasingly looking beyond compliance services to seek strategic guidance and support from their accounting practices.

By stepping into the role of a business advisor, accountants can drive client growth and foster deeper relationships. This approach not only brings in higher fees for specialised services but also serves as a strategic manoeuvre to maintain competitiveness and profitability in an ever-changing market.

Technology and advanced tools have allowed accountants and bookkeepers to save time and redirect resources to high-value tasks. Streamlined processes and automation now make running a firm possible in a way that works for you.

With the continued cost of living crisis and many economic challenges facing businesses, business advisory can help firms transcend traditional boundaries to become indispensable allies for businesses.

During these uncertain times, companies might need support such as cost-cutting, restructuring, or exploring new markets. They might also need help managing their cash flow and advisors can help identify areas to improve liquidity and develop strategies to ensure the business can meet its short-term financial obligations.

Beyond immediate survival strategies, business advisors can help firms build long-term resilience, better preparing them to withstand future economic shocks. This includes developing robust financial models, diversifying revenue streams, and enhancing operational flexibility.

This can be a lifeline for business owners in many ways, helping them transform challenges into opportunities. And if you have chosen to offer business advisory from the start, you can reap even more rewards.



## Hot tip

To become an advisor for your clients, start with your own experience. Consider the issues you've faced and solved, such as payroll or marketing. You can also upskill in other areas to offer them a holistic advisory service.





**Sam Gooding**

Partner at Gooding Accounts



## The important role we play

Growth is about bringing the right people into your team. This role becomes particularly crucial during economic downturns, contrary to the common underestimation of our profession's importance.

Questions about our relevance in challenging times only reinforce the fact that accountants are more necessary when businesses face financial strain. They look to us for advice on saving money, reducing tax liabilities, and maintaining their operations and lifestyle. The impact we've had over the last 18 months has arguably been more profound than in previous years.

The COVID-19 pandemic brought our essential role into sharp focus. In the early stages, we received 700 calls from clients seeking direction amidst the uncertainty, underscoring the deep trust in accountants as the go-to source for

financial guidance in times of crisis. Indeed, we are heroes, often the silent type, and this should be more publicly acknowledged. I feel that promoting the hero narrative could significantly benefit our profession, serving as a potent marketing tool.

Intuit's campaign to highlight the accountant's role is a step in the right direction, encouraging more accountants to embrace and publicise the vital role they play, thereby strengthening their position in the market.

Reflecting on our value to our clients and the broader economy is crucial as we continue to navigate these challenging times.



# Finding your competitive edge and promoting your brand



## Aynsley Damery

CEO of Clarity and Director  
of The Accountants Bootcamp

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### Standing out from the crowd

Too many accountants are working too hard for too little return. Just look at this benchmarking report. We are in a mature industry, and the need to stand out from the crowd and succeed requires us to find and adequately market (i.e., explain) our competitive edge. Why are we in business? What do we stand for? Who do we best serve? What value do we bring? Above all, why are we different?



### The reality

The reality is that many accounting firms are already out there trying to do the same thing. Small business owners need help to truly understand what we do as accountants and the value we bring. They think we are all the same, and our language tends to feed that 'sea of sameness': "We're different, we're innovative, we're proactive, we add value, we care about our clients, we deliver business advice etc., etc.



### Finding your competitive edge

Starting an accounting firm is an exciting time. You've left another firm to do it better or come from the industry to share your expertise. You have a vision of creating a standout firm and have a rough plan in your head. You know you can do it differently and make a significant difference to small business owners. You're eager to get started. Sound familiar?





## Aynsley Damery

CEO of Clarity and Director  
of The Accountants Bootcamp



## What is your firm's Ikigai?

Ikigai is a Japanese concept that translates to 'a reason for being' and represents the intersection of what you love, what you are good at, what the world needs, and what you can be paid for.

We've adapted this for accounting firms, effectively helping you understand your true purpose, competitive edge, and differentiator.

The services that  
you are great at



The services  
that your ideal  
clients need

The services that you can get paid  
(what you are truly worth) for



## Sharpen your competitive edge

- Truly understand your business model and who your ideal client is, what they want, and what they value. Create avatars for your ideal clients and market the services they need and where they hang out.
- **Speak the language of your ideal small business clients. By understanding their hopes, dreams, fears, and challenges, you can better connect and show your prospects that you understand them.**
- Your brand is critical. It's more than a logo, font, and colours (although the brand is also important today). It's your vision, purpose, values, and the way you communicate. Ensure it is authentic, explains your competitive edge, and speaks to your ideal clients.
- Don't make assumptions. We are too quick to assume that we know. Always, always, always validate, validate, validate.

Finally, business is challenging. The temptation is to take every client that walks through your door. I get it. You have bills to pay and need the cash flow. It may sound counterintuitive, but resist the temptation to take all comers. Stick to your ideal clients. It will save you a lot of time and headaches later, leading to more tremendous success faster.







## Bev Flanagan

Business coach & Director  
of Bev Flanagan Financial

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### You are the brand

Here's the deal: in a field where the fundamental services can be pretty similar across the board, your real differentiator is you—your authenticity, your approach, and your personality. Whether you're good at networking or prefer a more understated approach, owning your style and what makes you unique will attract clients. Authenticity resonates with people, and that genuine connection often clinches the deal. As the phrase goes, 'People Buy People' is absolutely true.

**It's easy for us in the accounting and bookkeeping field to overlook the immense value we bring to our clients. Quick fixes for us might be monumental challenges for them.**

Remember, the efficiency and knowledge you offer result from years of experience and skill development. When you save a client from a potential mishap, it's not just another task ticked off the list; it's a significant problem solved and worth recognising and valuing.



It's about building a network of partnerships that allows you to offer a rich tapestry of services, appreciating the unique value you bring to the table and embracing your individuality in how you present yourself and your business to the world.

This strategy enriches your service offering and ensures your practice is well-positioned for growth and success in a competitive market.





## Bev Flanagan

Business coach & Director  
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## Tips that will help you kickstart your branding journey

- When you're just starting out, **don't feel like you have to perfect** every aspect of your branding right away. It's okay to take your time and focus on the most important elements first.
- Prioritise creating a **standout logo that reflects your firm's ethos**; something colourful always helps. Everyone knows me for the colour purple.
- **Good headshots and visually appealing graphics** can significantly affect how your brand is perceived. These contribute to the professional image you want to project.
- While **consistent social media activity is crucial**, it doesn't require a hefty investment—just a commitment to regular engagement and content that resonates with your target audience.

- A foundational step in your marketing strategy should be **identifying your ideal client**—understanding their pain points, desires, goals, and aspirations. This clarity will guide your efforts, ensuring your messaging speaks directly to those you aim to serve.
- You don't have to spend large amounts of money. Pick a social media platform where your target audience is most active and commit to posting consistently. This **focused approach is more effective** than spreading yourself too thin across multiple channels.





# How to use social media to maximise your practice's potential



**AJ Brinnand**

Senior Social Media Manager, QuickBooks UK

Social media is one of the most powerful tools for businesses looking to enhance their visibility, credibility, and, ultimately, their client base. It can be one of the most cost-effective ways to promote services and provides a direct line of communication for you to connect with your audience.

But competition is fierce on social media, and you'll need to make sure your posts cut through the noise and truly resonate with your audience. Within the last year alone, 266 million new users have come online, so if you're launching or looking to grow your practice, understanding social media platforms is a necessity.



**Remember: You don't have to be present on every platform. Decide where your target audience is and create the content for those conversations. We call that 'fishing where the fish are'.**



## Hot tip

Posting relevant content to your target audience can help establish you as a thought leader, earning trust as an expert. You can demonstrate your expertise and value by contributing meaningful comments that add to or build on the original posts narrative. This proactive engagement can prompt others to visit your profile. Committing to this practice daily, even with just five meaningful comments on others posts, can significantly boost your online presence. It's a manageable goal that yields long-term benefits.





## AJ Brinnand

Senior Social Media Manager, QuickBooks UK

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### Getting to grips with algorithm

Each social media platform has a different algorithm to determine the most relevant posts with the aim of keeping users online and engaged for as long as possible. Understanding the algorithm can boost your online presence and get more potential clients through the door.

When you publish a post on any social media channel, only a tiny fraction of your followers will initially see it. If this initial group interacts with your post—whether by engaging directly with it, watching an entire video, revisiting the text, or clicking on an image—the platform broadens the post’s visibility to a larger audience segment. This is a process that gradually extends the reach of your content based on user interaction.

### The key to visibility

Social media algorithms prioritise content based on user behaviour, engagement history, and recency, first showing users the most relevant and recent posts. Your relationships and connections on social media will also influence visibility - the more frequently a user interacts with your content, the more it appears.

The more users log in, the more tailored their feed becomes, highlighting the newest and most pertinent posts. Essentially, algorithms focus on keeping users engaged by curating content that aligns with their preferences, not necessarily what you’re trying to achieve.







## AJ Brinnand

Senior Social Media Manager, QuickBooks UK

### Going viral

Posts can go viral, gaining traction with users similar to your current audience but who still need to follow you. This level of visibility is critical as it opens doors to new clients, interested audiences, and potential thought leadership opportunities. Achieving the right balance means your following will increase as more people are attracted to your content.

Every week, aim to post at least twice and connect with new people you discover through your feed or relevant hashtags. This strategy not only enhances the visibility of your network but introduces you to potential collaborators, clients, and followers interested in your field.



### Hot tip

1. Your social media bio is your sales pitch; it decides if someone clicks on your profile or scrolls past. Craft your bio to state your target audience, the benefits you offer clearly, and the extra value your services provide.
2. Small businesses and sole traders might not recognise all your qualifications or the industry jargon. While your achievements are significant, and LinkedIn offers space to highlight them, prioritise clarity over complexity in your header. Use this prime space to capture attention with language that resonates with your audience.





**AJ Brinnand**

Senior Social Media Manager, QuickBooks UK

## Social media success checklist:

**1**



### Define your audience:

Are you looking to attract new clients, establish thought leadership, or engage with your current client base?

**2**



### Outline your objectives:

What is your ultimate goal through social media? Do you want your audience to get to know your brand, become an engaged audience, or buy your services? Your goals will dictate your content strategy and the platforms you should prioritise.

**3**



### Be authentic and provide value:

Authenticity resonates. Focus on delivering real value that fosters trust and loyalty in your own style.

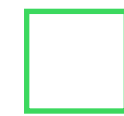
**4**



### Utilise a content calendar:

To help you post consistently and build a solid online presence. Remember quality over quantity; post valuable content less frequently than marketing or salesy posts.

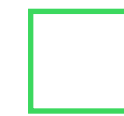
**5**



### Engage with your audience:

Respond to comments, participate in discussions, and acknowledge feedback. This will boost visibility and strengthen followers' relationships.

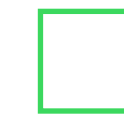
**6**



### Measure and adjust:

Track your social media posts using analytics to understand your audience's behaviour. Do more of what works and less of what doesn't.

**7**



### Stay updated:

It's essential to stay up-to-date with audience trends to adjust your strategy.

### Remember

Success on social media doesn't happen overnight. It requires patience, persistence, and a willingness to learn and adapt.



# Getting clients to write reviews

**After launching your practice, encourage your existing clients to give you online reviews to show new business owners that your skills and services are what they need. How? Try these tips.**

## **1. Don't be afraid to ask:**

You might feel uncomfortable asking your clients for online reviews, but you don't have to. Most clients will be more than happy to make a recommendation as a thank you.

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## **2. Make it easy:**

Include a link to the review site in your request so your clients don't have to spend time searching for it. This means less effort for your client, and you can be sure the review will be posted where it will have the most impact.

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## **3. Double your impact:**

With so many review sites (Google, Trustpilot, Facebook, QuickBooks' Find-a-ProAdvisor directory, and more), it's worth asking your clients to post on two platforms.

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## **4. Return the favour:**

If you use your client's services, also offer them a review. Ask where they'd like you to post it, as particular sites may be geared up to their industry.

## **5. Follow up:**

Your clients are busy people, so don't take it personally if they don't post a review after your first request. Follow up two or three times, leaving a week or two between each message. And send a thank you note once they've posted the review.

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## **6. Be persistent and consistent:**

Set a weekly reminder to ask a different client for a review/follow-up on requests sent. There are several reasons for this. Firstly, once a week is manageable. Secondly, it's much easier to follow up than sending a mass email to your entire client base. Be aware that review sites get suspicious of businesses that simultaneously bring a high volume of reviews.

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## **7. Remember, the QuickBooks Find-a-ProAdvisor Directory is the first stop for many small businesses looking for accounting support.**

Get the reviews right, and you'll gain more clients and grow your practice.



# Lift off lessons



## Build your network

"I would build my network and make connections right at the start. Having an existing network before starting or dedicating more time to developing contacts would have been hugely beneficial. Looking back, I would have started smarter, knowing different payment providers and all the moving parts of running a business, including marketing, sales, and IT. Having a handle on these would have made life easier." - **Kamil**

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## The pitfalls of comparison

"With the rise of social media, it's only natural to compare yourself to your competitors. However, it's crucial to remember that these snapshots are just that—a curated highlight reel. Comparing your fledgling practice to a firm crushing it online or having hit a financial milestone can skew your perception of your progress. This disparity in size, experience, and resources can lead to feelings of inadequacy, which can stifle your growth. The key is to focus on your path and milestones, recognising that every practice has its unique journey." - **Bev**



## Make your brand human

"People naturally gravitate towards human connection over corporate entities, so it's no wonder brands see 11% less engagement compared to personal profiles. People would rather interact with real voices than face a barrage of marketing, especially when many come to social media to be entertained and catch up on the world. While a brand profile for your business is vital, your personal profile will set you apart as a thought leader and give you an immediate leg up." - **AJ**

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## Tap into community and support

"For the solo practitioner, the entrepreneurship journey can often feel isolating and lonely, regardless of the business's size or whether a co-founder is involved. Joining a community where you can share experiences and challenges validates your journey and provides relief and support. This collective wisdom can be a lifeline in navigating the complexities of business ownership, emphasising the value of shared experiences and the power of knowing you're not alone in your struggles." - **Lucy**

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## You don't have to work with everyone

"Knowing why we do the work we do and the values that drive is a crucial part of how we run our practice. It's something we think about when we engage with any client. To put it simply, we don't work with everyone. This means we sometimes have an onboarding meeting and if the fit is not right for me or for my team, we decline the work. You can also look at it as potential clients working within our values and then the way that we want to work with them. Filtering quite early on works well for us and saves us lengthy conversations and losing valuable time." - **Kamil**



