

accounting**WEB**

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# Practice innovation handbook

How practices can use the MTD ITSA delay  
to drive innovation and increase efficiency.

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In association with:



# Editor's foreword

In the constantly evolving world of accounting, innovation has become a crucial aspect of driving growth and success.

The long-promised introduction of Making Tax Digital (MTD) has significantly impacted the accounting industry, prompting practices to reconsider their strategies and adapt to new standards.

Our *Practice innovation handbook* starts with an examination of the effects of MTD on accounting practices, emphasising the importance of seizing the opportunity provided by the delay in its implementation to address underlying inefficiencies and foster innovation.

But we then delve into four core dimensions: process & strategy, technology, your people and clients, spotlighting areas of enhancement and encouraging accounting practices to embrace transformative changes.

Navigating change is rarely straightforward. It often bears the weight of potential challenges and risks, such as the cost of implementing new technologies or potential resistance from employees. Our handbook, however, offers practical insights and strategies to mitigate these hurdles, with real-life examples of how other practice owners are driving innovation, efficiency and sustainable growth.

Practice innovation is a topic that ties in with the continuous improvement ethos of our Accounting Excellence Awards programme, so I'm pleased that many of our contributions are from individuals and businesses that have been shortlisted for or won Accounting Excellence Awards, including Nikki Adams, Lucy Cohen and Alex Falcon Huerta, as well as judges such as Della Hudson, Tom Herbert and Alastair Barlow.



**Joanne Birtwistle**  
editor in chief, AccountingWEB

# Partner's foreword

We know accountants and bookkeepers are facing a number of challenges around issues like regulatory changes, the need for increased digital agility, and how to demonstrate value in a world of constant change.

Regulatory changes can be a burden that undermines accountants' capacity to make time for high-value client support like advisory services.

However, the delay of MTD for income tax self assessment (ITSA) allows for more time to look at the bigger picture of how your practice is performing on the whole and there are lots of ways practices can identify areas for improvement and make changes that will ultimately drive innovation and increase their efficiency.

We've heard from many of our partners that it's hard to know how to tackle hurdles and what changes need to be made to create genuine efficiencies. This is critical in ensuring they can thrive, not just now but in future years too, especially as they continue to operate against a challenging backdrop.

At Xero, we're working closely with our partners to help them innovate and evolve as the industry changes. It takes time to fully adopt and embrace true digital transformation. To maximise the benefits and minimise any disruption it's important to have an effective change programme, one that incorporates curiosity, collaboration and an open mindset.

We're here to support you every step of the way. We hope the findings of this report inspire you to continue to innovate, unlock more efficiencies, and ultimately give you more time back to spend on the work you love.



**Jo Copestake**  
sales director, Xero

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# How MTD stifled practice innovation

The urgent need to prepare for Making Tax Digital sparked a rise in cloud adoption but the demands of the digital project stifled innovation elsewhere.

**W**hen George Osborne infamously declared the “death of the tax return” in 2015, nobody could predict the very-slow-moving car crash that was about to happen. Eight years later, the digital tax transformation project has undergone multiple delays and faced a flurry of criticism, but the tax return is still very much breathing.

While Osborne’s original vision has yet to come to fruition, Making Tax Digital (MTD) has regardless had a profound impact on the accountancy profession. The irony is that while the then Chancellor hailed the digital project as innovating the tax system, an argument can be made that it has actually had the opposite effect.

Practices have had their hands so full with getting clients prepared first for MTD for

VAT and then the proposed start date of Making Tax Digital for income tax self assessment (MTD ITSA), that there was no time for anything else.

## Innovation sucked into the MTD vortex

Data from the Accounting Excellence Awards entries shows the sharp rise in firms putting cloud accounting systems in place as a result of the MTD effect. But for many firms, this is where their innovation started and stopped. The demands to get ready for MTD narrowed the firms’ ability to explore the tools.

According to the founder of Accounting Excellence Award-winning firm Farnell Clarke and cloud pioneer Will Farnell, there has been a pause in tech innovation compared to the pre-MTD period. “There’s people that had gone out and put clients on Xero and QBO, but had not put them on

a Dext or an Auto Entry, so they’re kind of missing the whole point.”

Similarly, Alex Falcon Huerta from Soaring Falcon Accountancy said the panic from firms to adopt cloud tools as part of the initial push to get ready for MTD created a situation where some firms were just doing the bare minimum to comply.

Reflecting back on the HMRC roadshow in 2018/19 that she attended, Falcon Huerta remembered how “people were just scared about getting their books in the cloud. I still hear from firms that don’t want to go any further with digitalisation because they found it hard.”

So while MTD acted as a catalyst in pushing firms online, the real tech adoption appears to be low. “They’ve been told that what they’re doing is tech innovation, but they haven’t adapted their service model to say, ‘If we’re going to use those tools, we’ve got to fundamentally change how we use them,’” commented Farnell.

## Where is the innovation?

The obsession with MTD also clipped the wings of the cutting-edge firms. Glenn Martin, the founder of Avery Martin, has noticed a lack of innovation in the aftermath of the delay. “To lead as an accountant, you really have to be doing the

next big thing, and at the minute, what is that new thing?” he said.

“A lot of the software vendors switched all their focus to developing MTD products, and didn’t develop the core products, while practices spent a lot of time testing other apps for MTD and cleaning up their client bases,” said Martin.

The time lost to MTD created a situation where more firms were able to catch up with the original pacesetters, which for Martin has made it more difficult to differentiate himself.

“I used to always think we were towards the front end of the game. But at the minute, I just feel we are just like any other accountant now. Everybody is using the same tools and there’s not new stuff really coming through. We haven’t got a unique offering anymore, whereas five years ago, we did,” said Martin.

*“To lead as an accountant, you really have to be doing the next big thing.”*



It's not just MTD that's stifled innovation. Along the way it's had to take the back seat for the pandemic, which caused firms to drop everything and support their small business clients with furlough claims and self-employed income support scheme support.

Then the aftermath of Brexit meant firms were spending far too long getting their heads around the complexities of VAT rules and treatments after the UK left the European Union on 1 January 2021, and not enough time thinking about client experience.

Throw in additional admin headaches from GDPR and anti-money laundering compliance, and it's no wonder innovation

has stalled for many firms and they haven't shifted out of their first gears of cloud innovation.

#### What has MTD ever done for us?

This paints a bleak picture of the current state of innovation. Not wanting to go on a "What have the Romans ever done for us?" monologue, but there is a lot to credit MTD with.

When Osborne made the announcement in 2015, only 42% of Accounting Excellence entrants were talking about the cloud. In 2016 that number jumped to 57% and then skyrocketed to 73% in 2017 and by the time the pandemic hit in 2020 and firms needed software to support remote working, that number had climbed to 89%.

Running alongside that upwards trajectory was an uptick in adoption of expense capture tools and practice management apps, as the demand of MTD galvanised firms into looking towards technology to support them with challenges of collecting client data and an increased workload.

Meanwhile, the shock of the pandemic forced firms to embrace remote working, flexible working and video conferencing software.

But while these steps are positive, the stop-start nature of MTD has stopped

the average accounting firm from going all in and sharpening their continuous improvement mindsets.

As such, Farnell maintains only 20% of the profession have adopted the core cloud technology, and only 20% of that figure could be considered within the digital vanguard and have the rest of the cloud solution right too. "It's almost as if we're waiting for the firms to catch up with the leaps that were made from a technology perspective five to six years ago."

#### What's next?

Another twist in the MTD story happened at the end of last year when the Treasury delayed the digital project for a further two years. The "death of the tax return" has been pushed back until April 2026, giving firms extra space to not only get on track with their plans but also to innovate.

They have finally been given breathing space, without the distractions of a pandemic or Brexit, to focus just on their practice without the ominous ticking time bomb of MTD.

As Falcon Huerta said: "People have to go online, not just because of MTD but because of their own business reasons, and have all of their information in the cloud so they can make decisions through real-time reporting."

*"People have to go online, not just because of MTD but because of their own business reasons, and have all of their information in the cloud so they can make decisions through real-time reporting."*

Meanwhile, Martin believes firms will use this period to focus inward and get their business more streamlined, such as getting their "practice management singing. Because for many accountants, it's currently only doing half of what it's capable of, because they've just not had the time to do it."

MTD ITSA has not gone away, but the pressure has. Practice owners can now use the time to identify efficiencies within their own practices, examine their people, clients, processes and strategy, alongside their technology offering.

For the first time in a long while firms have the opportunity to break away from the average and embrace practice innovation again.



**Richard Hattersley**  
editor, AccountingWEB

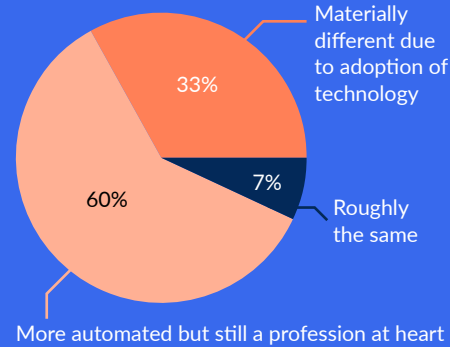
### The cumulative effect of ongoing changes to reporting standards, AML, post-brexit arrangements, MTD and others is taking its toll.

#### Factors deemed important in contributing to capacity challenges

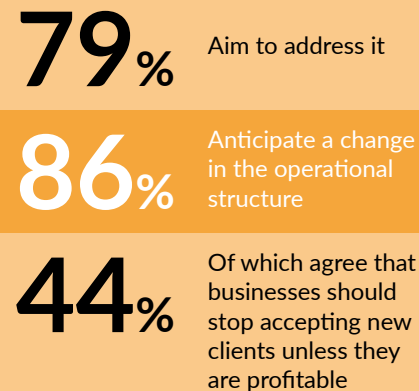


Source: AccountingWEB Intelligence survey August 2023

### How firms see the profession changing over the next 5 years



### Of those who see capacity challenges as a long-term issue:

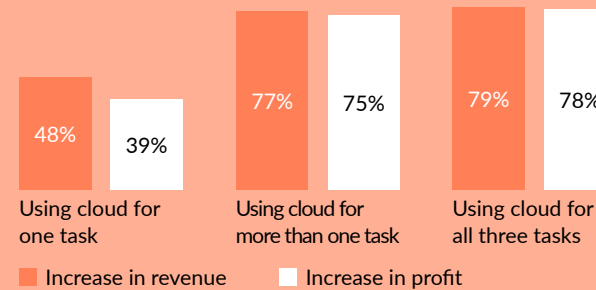


Source: AccountingWEB Intelligence survey August 2023

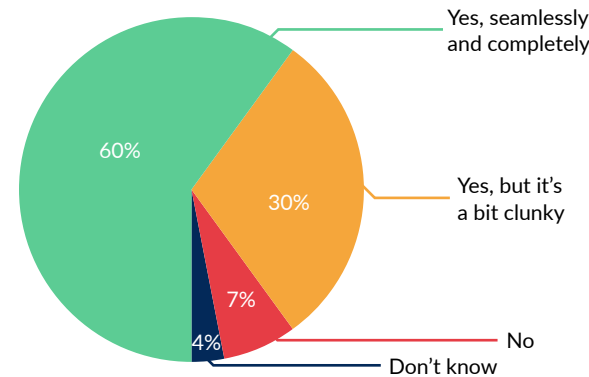
### Practices using cloud for more than one task are significantly more likely to see profit and revenue growth.

Source: Xero's 2023 Industry Performance Report

#### Percentage of practices that have increased profit and revenue over past 12 months



### Is your practice management software integrated with your accountancy software?



**39%**  
Of practices using cloud for a single task also reported an increase in profit compared to practices using cloud for more than one task.

**60%**  
Of practices using cloud practice management software have successfully integrated it with their existing software. However, medium and large practices are more likely to have done it seamlessly.

**86%**  
Of those who say their practice management is integrated also reported increased profit over the past 12 months.  
Source: Xero's 2023 Industry Performance Report

Chapter 01

# Make passion your strategy

A clear strategy combined with passion and focus facilitates innovation and helps business owners create what they dreamed of when they started out.



Della Hudson  
founder, Minerva



**M**aking Tax Digital (MTD) seems to have split the profession between those who have used it to forward their own digital agenda with the ensuing benefits to clients and those who have taken a more “wait and see” approach in the full knowledge that HMRC projects are always delayed.

At Hudson Accountants, and then again at Minerva Accountants, we used the MTD stick alongside the carrot of businesses having up-to-date numbers and the ability to invoice and take payment on their phones. Our strategy was summed up as: “Let’s do better business.” As a business owner, my passion is to see other business owners achieving the business that they dreamed of when they first set up.

### Passion is key

Passion seems to feature in a lot of the strategies of founders of smaller practices where personal goals often merge with business ambitions. Bryony Thomas of Watertight Marketing is keen for everybody to have as much of their work as possible in the purpose/passion and profit quadrants, rather than just one or the other (and none in the quadrant that neither excites you nor makes you money). The areas to be avoided are obviously those clients and work that neither make your eyes light up with enthusiasm nor ring up the cartoon pound signs.

Sharon Baker of Kinder Digital Accountants believes that, if she runs her business so that her team and family are happy, then her clients will be happy too. Jo Copestake, sales

director at Xero UK, thinks that passion is critical because it can inspire your clients too.

### Pick your strategy

Our strategy was simple: first get clients keeping up-to-date digital records that would enable us to operate more efficiently internally, and then use the up-to-date information and time saved to do more for our clients. Other accountants choose to pass the efficiency savings on to smaller clients in the form of cheaper fees. Every practice is different.

Pam Phillips of de Jong Phillips shared the strategy to be the outsourced full finance function for all its clients. It does this by leveraging technology so that it can collaborate remotely and it has niched so that it is better able to be an expert in what it does. It only works with agencies and with businesses that are on or are willing to move to Xero.

### Find your ideal client

Having a clear idea of your ideal client allows you to focus your marketing on just those people. This means that you are in the right place for them and can speak directly to them. Some firms only niche their marketing while others niche their whole client base so that they can benefit from internal efficiencies and in-depth knowledge.

*“There is nothing to be gained by keeping your strategy a secret so share it widely so that everybody can contribute ideas.”*

Phillips finds that by working only with agencies it really knows their industry as well as the common challenges they face (and solutions). It can then tailor everything it does to support its agency clients and focus only on learning about tech that agencies need. There is no need for it to learn about stock systems for example.

### Sharing your strategy

This seems an obvious thing to do – share your strategy with your team so that everybody is clear on what the end goal is. We do it at Minerva Accountants, Phillips does it at De Jong Phillips and Baker does it at Kinder Digital Accountants. There is nothing to be gained by keeping your strategy a secret so share it widely so that everybody can contribute ideas.





If your team understands your strategy they can also fill in the gaps where you don't have processes in place. They will be able to second guess what you would do.

### More profitable clients

The key to finding more profitable clients is that it takes time. It may seem counterintuitive but spending more time with your clients can lead to higher fees.

De Jong Phillips finds that regular contact with its clients (daily, weekly or monthly calls as needed) means that it is close to its clients' businesses and better able to get involved. Sharon has also found that its most successful clients are those who meet monthly to keep them on track with their action plans.

*“It may seem counterintuitive but spending more time with your clients can lead to higher fees.”*

### Where to start?

Mark Twain said: “There is no such thing as a new idea. It is impossible. We simply take a lot of old ideas and put them into a sort of mental kaleidoscope. We give them a turn and they make new and curious combinations. We keep on turning and

making new combinations indefinitely; but they are the same old pieces of coloured glass that have been in use through all the ages.”

Phillips recommends finding ideas from elsewhere and making them our own. Start by reading business books or following other accountants to see what they are doing and sharing. You can also learn from experiences outside of the accounting practice. Before working in practice she worked in decision support in an investment bank. When she started up de Jong Phillips, she wanted to bring that level of forward-looking financial support to small businesses.

There are plenty of resources out there and Baker also recommends collaborating with other accountants and learning from those who have already done what you're trying to do.

There's no need to reinvent the wheel in a profession where so many are willing to share and collaborate.



# Collaborate to go your own way

Despite being a sole trader, Sharon Baker of Kinder Digital Accountants, puts great stock in collaborating to work out the right strategy.



As a Xero MVP (most valued professional) winner and a regular awards finalist, Sharon Baker, MD of Kinder Digital Accountants must be doing something right. It's been a tough few years and Baker admits that she has been treading water for some time but, with her recent rebrand, she is now raring to go again.

As a sole practitioner, Baker doesn't need anybody else to agree her strategy but she does have a circle of trusted professional friends with whom she can discuss her ideas. "It's definitely a collaborative space – you can't do it on your own. Be guided by people who've been there before," she said and the Kinder values include being curious and sharing knowledge. As well as this network Baker has regular accountability calls with her Clarity mastermind group and business coach Brad Burton.

Baker shares her strategy widely with her team and they are welcome to add their ideas. The recent name change came about through a sticky note brainstorming session. Baker often includes her team in deciding the strategy. For instance, when they recently lost a team member, instead of bemoaning the current recruitment crisis Sharon asked her team to focus on "What does this now make possible?" The team are encouraged to ask questions and none of them do things just because they've always done it that way.

Baker has the sole practitioner advantage of quick decision-making and action but also the benefits of a proactive team.

Her ideal clients are professional service businesses where Baker uses her knowledge and experience as a successful business owner along with Clarity software to build a plan. She has the most success with those meeting monthly for regular accountability and gently nagging. "I love the joy on their faces when you show them what is possible and hold them accountable," said Baker. As is often the case when working with ideal clients where you feel both purpose and passion, this is also profitable.

*"It's definitely a collaborative space – you can't do it on your own. Be guided by people who've been there before."*

Other ideal clients are hospitality businesses as this is Baker's own background so, once again, she is able to add real value for clients who are prepared to delegate all their finance to the firm and to meet regularly.

**Sharon Baker**

MD, Kinder  
Digital Accountants



Baker's advice to fellow accountants is to be open-minded and learn from the people around you. She still remembers her first Xerocon (AKA "Hogwarts for accountants") where she was introduced to other accountants who were a little further along the path. She recommends being curious and suggests that you find the people who inspire you.

with Xero accountants. It takes something special to stand out and Kinder Digital Accountants' strategy is to look after its people and their families in order to make their clients even happier.



**Della Hudson**

founder, Minerva

*"I love the joy on their faces when you show them what is possible."*

Baker achieved great success as an early adopter of Xero but that is no longer enough now that the high street is flooded

*"Be open-minded and learn from the people around you."*



# Keep the destination in mind

What can accountants learn about setting their strategy? Jo Copestake, sales director of Xero UK, used feedback from their many partners to offer the following advice.

Take the time to consider what you want your future to look like. What does success look like in your eyes? Share it with people you trust and consider whether you have stretched yourself enough or are playing it a little bit too safe? Because you need to have a destination in mind.

Then you need to break it down into really manageable chunks – milestones, but also timelines. Setting smaller goals is important to enable you to celebrate the successes you've achieved on that journey. It's also a great opportunity to reflect on how far you've come, and you can potentially adjust and set the correct course for the future.

When building your strategies it's important that you understand not only what your strengths are, but also what your limitations

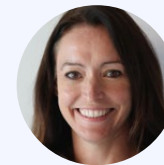
are, because this is where you need to bring in support from others. Your limitations will be somebody else's strengths.

Accountants and bookkeepers who we see really thrive have clearly identified their ideal client. Segmentation of your client base is really important as you can build out your value proposition much more effectively. You can look at the things that this client base values from your services – and also what services are you missing that they're going to need that you can potentially build in. That's where you can really add that extra value.

Not only is it the value proposition but it's also about the efficiency gains you can get from having one group of clients. You can just bring in so many process improvements

and efficiencies and really streamline your workflows as a business.

Looking at some of the smaller practices, it's amazing to see when they are targeting one industry that they're really passionate about. This shines through to clients who can also see that passion.



**Jo Copestake**  
sales director, Xero

*“When building your strategies it's important that you understand not only your strengths but also your limitations because this is where you need support.”*



**Glenn Martin says the first steps to growth need to happen internally**

**To refine your practice strategy, you need to build out your business plan for what the next 12 months will look like and what you want for the next five years.**

If you want to grow and become a slick organisation where you're dealing with lots of people efficiently, then you'll need to have some sort of outsource team. But if you're looking to become more artisan or niche, you either need to focus on a client type or an industry type and become the master of that game and dominate the space.

So tighten up what you're doing, get your costs batted down and become as efficient as you can and use technology to serve your clients with good practice management and automation.



**Glenn Martin**  
founder, Avery Martin

FIRST STEPS



# Chasing continuous improvement



When looking to maximise efficiency and uncover new opportunities to turbocharge his firm, Gary Deans of Box Accounts found that reviewing his processes and strategies was the perfect place to start.

For many firms, even small tweaks to their processes can pay dividends. Whether it's investing in tech or revamping your customer experience, opportunities abound for the growth-minded accountant.

"Growth is of course important to us and we're always looking to improve," said Gary Deans, director of Box Accounts, a small, family-run firm. "I work with my wife and my son has recently come on board as a trainee accountant, so I want to grow the business in order to support my family."

This growth mindset has led to exciting improvements across Box Accounts in recent

years, with the firm looking forward to a lucrative future. However, Deans will be the first to admit that achieving this has taken time, with the firm always reviewing its processes and strategies to iron out inefficiencies.

## A human-first firm

An area that Box Accounts is particularly proud of is maintaining a top-quality client experience.

Not looking to compete with the more resource-heavy businesses, Deans' firm has instead focused on innovating the personal rather than "treating clients as a number".

"Since Covid, clients are again wanting to see

their accountants face to face," Deans said, adding that he ensures he visits every client personally, no matter where they're based.

This personal touch has created excellent opportunities to more intimately gauge client experience, and allowed Box Accounts to iron out issues. "We always keep in touch and try to better ascertain our clients' needs through feedback," Deans said.

## Tech as an aid not a replacement

While the Box Accounts team innovates via its focus on the human aspect of accounting, Deans and the team are still open to improving processes through technology.

"We use a lot of Xero's accounting tools, as well as Dext and Ignition, which both the team and our clients have found user friendly. They've also saved us so much time on the compliance side of things, meaning we can give even more time to our clients to help invest in their future plans.

"I trained up in the 80s, and remember having to work with bags of receipts, so things have definitely come along since then! It would be foolish not to use tech as a tool to boost efficiency," said Deans.

The creation of a digital office is something that has given Deans the freedom, as well as cost savings, to offer even better services.

"I can work from anywhere now," Deans said, noting that meeting up with clients has become easier than before. "I was working out of an office that was costing me £12,000 a year. Now I have a digital office, I'm freed up to give more time to my clients."

## Continuous development

Tech tools have also been extremely helpful in training, with Deans priding himself on his firm's commitment to continuous development and education. "Xero has helped loads with training, especially when it comes to developing my son's skills and learning development."

Looking forward, the future looks bright for Box Accounts, with Deans looking to continue its winning streak. "In the past few years, our business has grown by 40%, so we want to keep that going by continuing to innovate," Deans said.

"But it all comes back to our clients – if our processes are efficient then it helps them. And that's what we enjoy with our clients: actually making sure that their processes are as efficient as ours."



## Will Cole

community and editorial assistant, AccountingWEB

Chapter 02

# Reshaping operations in the digital age

Digital tools have profoundly affected the accounting profession over the past decade, but the distribution among firms remains unevenly spread.



Tom Herbert  
technology editor, AccountingWEB



**W**hat can new platforms or systems offer accountants, and what does the future hold for those looking to get their firm on a digital footing?

In a similar way to the wheel or the printing press, digital tools have had a profound impact, not for their own sake, but because of what they enable people to do. From an accounting standpoint, digitalisation has had a transformative effect, not only on the way accountants perform their day-to-day tasks but also on the nature of the tasks themselves.

Traditionally manual tasks such as data entry and document management have been automated via bank feeds, data and expense capture tools and automated workflows, freeing up time for staff to focus on client care, new service lines or making their practice more efficient.

*“In a similar way to the wheel or the printing press, digital tools have had a profound impact.”*

Automation has also changed the way many accountants handle tasks such as reconciliations, payroll processing and financial reporting. Software tools can automatically categorise transactions,

reconcile bank statements and generate financial reports at speeds much greater than humans can hope to manage. While current systems are by no means perfect, the time spent fixing anomalies is far less than the manual alternative.

Cloud-based practice management or workflow systems allow client work to be brought into the practice and allocated to the right member of staff at the touch of a button, avoiding the manual re-keying that previously accompanied the task. Such tools also enable real-time collaboration, allowing team members to work from different locations and enhancing communication among team members and clients.

#### Digitisation vs digitalisation

While some accountancy practices made an active decision that new technology isn't for them, other firms have either avoided new tools due to a lack of knowledge or confidence, or adopted digital technology without first understanding its place in the accounting landscape, how new tools fit together, and what wider benefits they can bring.

There are tales of firms purchasing cloud accounting software, for example, only to map over their old process to the new tools, keying in data by hand and continuing with manual bank reconciliations, while simultaneously

tearing their hair out at the fact that the time savings promised hadn't materialised.

While this is an extreme example, there are plenty of other, smaller moves that highlight the fuzzy lines between digitisation (putting something that's analogue, for example a paper receipt, into digital form) and digitalisation or digital transformation (where the use of digital technologies changes business processes or models, potentially providing new revenue-making opportunities).

So how are accounting firms using new digital technology? And what benefits are they bringing?

#### Do more of what you love

For Xero's head of UK product compliance and industry engagement Stuart Miller, digital tools allow accounting firms to build efficiencies and a culture of continuous improvement, future-proof themselves against regulatory or market changes, and give time back to accountants to do more of what they love.

“From a practice standpoint, what are we passionate about?” said Miller. “Speaking to clients, learning about their business and finding ways to help them save tax or money. This gets practitioners excited and having real-time information available through collaborative cloud accounting technology makes this easier.”





“For example, if a fully digitalised process allows you to have an up-to-date fixed-asset register for a client, you can flag to them that they’re about to hit the annual investment allowance threshold, so it might be worth holding off making that purchase until next month.”

According to Miller, technology also gives practices the opportunity to know their worth. “With better cost-checking measures in place, you can really see if a client is worth the firm’s time and find out if they’re profitable,” he said. “Some clients might not be, but provide 20 referrals a year. All this information can be readily available. It gives accountants and

bookkeepers the power to prove their value and say ‘this is my fee’.”

By setting their tools and processes on a digital footing, Miller believes accountants and bookkeepers are shoring up their practices against changes that will inevitably come in the form of regulation, economic turbulence or other, unexpected events.

“Any new regulations that come in, you can move more quickly, with more agility,” he said. “Through the pandemic, many accountants using digital technology were able to adapt quickly to remote working and use all the tools available to get the quickest form of help to their clients.”

And with a wide variety of regulatory changes coming in the form of cross-border e-invoicing, tax digitisation, and digital ID and anti-money laundering rules, Miller believes technology allows accountants to cope with whatever is thrown at the profession.

Digital transformation also allows larger firms to keep their staff happier and more engaged. “New colleagues joining the profession have been brought up on smartphones, not adding machines and ledger books,” said Miller. “Younger staff members at practices will usually want to use technology to drive efficiencies, productivity and growth because that’s what they’re used to. Those forced to use outdated tools will simply look elsewhere.”

#### How can accountants make a start on digital transformation?

Wide-reaching digital change takes a long time, and the hardest part is to take the first step.

“Many firms start by looking to identify inefficiencies within their practice and reviewing services they offer, and whether they can do it better,” said Miller. “Once you’ve done this, you can then look at utilising technology to build efficiencies.

“There’s a bit of trial and error involved,” he continued. “The transition to a digital-by-

default approach can be complicated and time-consuming and it’s difficult to have the confidence you’ve made the right decision. That’s why conversations are important, whether that’s with your staff, your clients, vendors, your representative body or other accountants at conferences or events.

“There’s a huge case for highlighting digital and digital transformation,” concluded Miller. “Whether that’s building efficiencies, having happier staff or better customer satisfaction. The ultimate end goal is to enjoy our working lives and give us enough time to enjoy life outside it as well. There are lots of accountants who are passionate about what they do, and digital transformation gives them the time to do what they love.”

*“The transition to a digital-by-default approach can be complicated and time-consuming and it’s difficult to have confidence.”*



# What does the future hold for accounting?

What could a firm achieve if it threw its hat into the innovation ring? Will Cole talks to flinder CEO Alastair Barlow about the future of technology in the accounting profession.



**W**ith the Making Tax Digital for income tax self assessment (MTD ITSA) can kicked further down the road, firms who have spent time and resources prepping for the big switch are now suddenly free to focus on other, more innovative projects to help propel their firm to that next level.

This newfound freedom could be the catalyst for some exciting new developments across the profession. Yet, while no one can profess to know the future, there is some merit in speculating what a firm that puts innovation at the heart of its operations could look like in the near future.

## Innovation from the outside

Not saddled with the inordinately heavy baggage of MTD, Alastair Barlow, founder of flinder, has instead focused his time on ironing out inefficiencies and innovating his business into a forward-thinking and tech-savvy operation. However, when asked to commit to a bit of future-gazing, Barlow argued that, unlike other sectors, traditional accounting is still grappling with a lack of forward-thinking firms.

“Compared to the technology world, you don’t see any overnight success in accounting. There’s 42,000 accounting firms in the UK and yet, there’s no dominant player. That’s because firms, especially those

with the business model of a partnership, lack agility and flexibility,” said Barlow.

Because of this, Barlow contended that, rather than coming from within, innovation will more likely come from outside players, with firms hopping on the bandwagon after seeing positive results.

“I feel that innovation won’t come from within, but will instead come from outside. Of course, you will have a small portion that will innovate from within the profession, but real innovation, I think, will come from forward thinkers from outside, rather than established firms.”

*“Compared to the technology world, you don’t see any overnight success in accounting. There’s 42,000 firms in the UK and yet, there’s no dominant player.”*

**Wide net vs a niched approach**

Asked what he thought the future held for these innovative disruptors, Barlow believed that firms will go one of two ways: a widening of services or a granulated niche, with the traditional firm becoming a less and less profitable operation as new developments change the profession.

“We’re already starting to see some of the more advanced pioneer firms saying: ‘Hey, I’ve got a good relationship here. I’m selling counselling services, let me sell HR, let me sell legal services,’ and so they’ll start to expand,” Barlow said.

“On the other hand, I think weirdly, you’ll then see some firms really niche down. Firms that figure out that they’re really good at offering a specific service and don’t want to spread themselves too thin.”

*“I feel that innovation won’t come from within, but will instead come from outside.”*

**Alastair Barlow**

CEO, flinder

**Seamless experience**

Asked to dig a little deeper and put forward a more fantastic image of what a firm that has truly put innovation at the heart of its operations might look like in five years’ time, the term that Barlow continually returned to was “seamless”.

According to Barlow’s predictions, the future accounting firm has ironed out the inefficiencies that plagued its predecessors, with tech taking a leading role in “eliminating human subjectivity” from the profession.

“My future firm would have all processes basically create a seamless journey,” Barlow said, predicting that the work that has long been the accounting world’s bread and butter will become increasingly automated as automation technologies continue to improve.

“A future accounting firm with enough capital could have its own large language model (LLM) and a set of reporting tools that can be verbally accessed, like Siri, by clients. You could ask for a daily update and the AI could seamlessly create unique reports for clients.”

However, Barlow also admitted that this creates a problem for the traditional accountant, meaning they too will need to evolve and adapt in order to stay afloat.

“People will need to have very strong business conversations and understand their clients’ businesses, not accounting. They’re the ones that have the relationship and take the business owner through that journey, but as much as possible the rest of the firm would be completely seamless.”

**Will Cole**

community and editorial assistant, AccountingWEB



# How Xero catalysed a firm's digital journey



For accounting firm [Hunter Gee Holroyd \(HGH\)](#), Making Tax Digital provided motivation to embrace digitalisation and build on its advisory services.

Accounting firm HGH left [Xero](#) ticking along in the background for years, before truly getting the best out of the platform. But with [Making Tax Digital \(MTD\)](#) approaching, HGH Director James Pullein realised it was time to embrace Xero's full potential.

"The first requirement for MTD was to have a digital solution for [VAT purposes](#)," said Pullein. "We felt it was best to put all our clients on to Xero to get the benefits of the digitised cloud system."

He set about fully integrating the Xero platform. With three offices in North

Yorkshire and a large client base, transitioning to Xero meant a big change management process for HGH.

"We were already on the cloud journey, but weren't being proactive," said Pullein. "When the first stage of MTD came in, we approached our clients with the view that they need to be ready for what's coming next."

## A group effort

The team at HGH also had their Xero account manager, Gareth, and Xero partner consultant, Claire, on hand. "The support Xero gave us was great. You're not dealing with a corporate;

you can just jump on a call and have a good chat," said Pullein. Claire supported the team with setting up [Xero Workpapers](#), and organising practice-wide training. "Now we're ahead of where most other practices would be. We're on the cloud, ready for when changes come in," said Pullein.

## More than just MTD-compliance

With digital workflows for year-end and bookkeeping set up in Xero, the team feels ready for HMRC's new digital requirements – and is excited for [MTD for ITSA](#).

"The fact that it's open and cloud-based means it will always be integrated. Xero is at the centre of what we build our practice around," said Pullein.

With compliance taken care of and confidence high, HGH can turn its attention to providing more advisory services for clients. "We want the numbers to run in the background and use our role as accountants to make sure that we're doing what we can do to help businesses grow," said Pullein.

By fully integrating Xero, HGH has future-proofed the practice and put client services at the heart of its offering. "Our end goal is to make a difference to our clients' lives. Being a digital practice with a focus on what's

coming next has allowed us to improve our firm and offer a better service," said Pullein. "We feel confident that if there are any future changes that are unknown at present, Xero will support us."

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Written by:  
**Xero**



# Digital technology: A driver for the humanisation of accounting

Whether it's utilising gaming devices to streamline practice processes to using his skills as a DJ and music producer to generate content for the accounting world, Dave Sellick, founder of accounting firm Sidgrove, has always tried to push the boundaries of digital technology in search of new ways of doing things.

According to Dave Sellick, it's important to look past the day-to-day functionality of the technology, and instead consider what it enables you to achieve thanks to the efficiencies it brings.

"Think about how the tech can help you do more of what you love," said Sellick.

"I look at things in a visual, tactile way, so I've tried to build a beautiful workstation to reflect this, but everyone in the profession will have a different take on this."

Sellick has built his practice around the humanisation of accounting, using digital technology to remove robotic, manual processes, allowing his firm to focus on human skills such as creativity, empathy and compassion. He estimates he has automated 80% of this practice work, with the remaining 20% of this work spent communicating with clients, developing the relationship and building trust.

"While it's not as simple as humans vs computers, there are tasks that robots can

**Dave Sellick**  
founder,  
Sidgrove



do much better than humans," Sellick said. "The task of absorbing information and regurgitating it as we've always been taught is actually optimised for computers. But using tech as an enabler frees us up to be more human, and more creative.

"This way working in the accounting profession is more fun, it's more inspirational, and this becomes a virtuous circle driven by technology. We work with technology to do a lot of things we used to do but now focus much more on human connections and creative thinking."

For Sellick, a future underwritten by technology requires agility and continuous creativity when it comes to how the systems are used – something he feels favours smaller, more agile teams, with those looking to systemise too much running the risk of losing that human element.



**Tom Herbert**  
technology editor,  
AccountingWEB

**Jo Wood says software allows you to focus on the high-value work**

FIRST STEPS

**The first thing you need to think about as a business owner is to remove yourself from the operational tasks.**

For me as a bookkeeping practice owner, I needed to remove myself from the bookkeeping side of things and leverage my time with software. So the first thing to do is focus on investing in receipt capture tools. I treated this investment like a first hire. I looked at all the ways I could get the same output that I would get if I had hired a new member of staff. I would then focus on my CRM as that is an area that definitely needs attention in the beginning. You need to remember is that a business is a profitable enterprise that runs without you and tech allows you to do that. By utilising tools and accounting software, you can focus on the high-value work that takes you to that next level.



**Jo Wood**  
coach and founder,  
Six Figure bookkeeper



# Tech with a touch of humanity

Technology has much to offer the practice owner, but the human aspect is still essential, says Sacheen Yadav.



When it comes to technological innovation, accounting has come a long way from the pen-and-paper records and bags of physical receipts of the past.

With a dizzying array of tools and programs at the fingertips of the tech-savvy accountant, it's never been easier to remove inefficiencies with the guiding hand of technology. And, with Covid changing the way many firms operate, as well as the coming artificial intelligence (AI) revolution promising to change the way accountants work, there is no better time to invest. For London firm Pennyhills, technology and practice innovation go hand-in-hand.

Starting out as a one-man band during the pandemic, Sacheen Yadav has grown his firm into a successful operation, with offices in London and Delhi.

## A tech-focused firm

Citing tech as a huge factor in his firm's success, Yadav said that innovative thinking was a requirement when setting up his firm at the height of Covid, finding that tools such as WhatsApp paid dividends in the early days. "During Covid, no one was really picking up the phone or wanting to check their emails. WhatsApp was a happy medium, however, as it allowed us to easily stay in touch and offer services," said Yadav.

And it was this focus on efficiency that allowed Yadav to offer the services of a larger firm.

"As it was just me I couldn't afford to waste 15 or 20 minutes here and there," he said. "So, we had to adopt systems to ensure things were done seamlessly."

Since then, Yadav has further leveraged the benefits of tech in the pursuit of growth. From moving to a paperless environment via Google Suite to integrating Xero's digital packages, Yadav noted that the efficiency and time-saving benefits have allowed his firm to focus on the high-value work that really matters. "We're spending a lot more time on relationship building and we're able to do that in part because of leveraging technology."

## Challenging curve

Of course, reaping these benefits isn't as easy as just installing the latest software package. "Cost was always a major barrier to entry, simply because, if it doesn't work, you're losing resources," he said. "Time is another costly aspect. Even when a lot of products are plug and play, you still have to spend time getting the team on board."

Presented with these challenges, Yadav and his team have had to pick tools that fit the firm rather than trying to mould the firm around the tech.

"The key is taking time to research and fully understand what we want it to do for us. This requires being quite cut-throat and saying no to other players that don't fit within our ecosystem."

## AI revolution

Looking to the future, Yadav has joined the chorus of those believing that AI will revolutionise the accounting industry. "We're going to have this almost like conversational-based AI, which doesn't feel like a robot. It's definitely going to take some of the 'dead work' out of accounting, which is really exciting," Yadav said.

However, in the short term at least, Yadav argued that the human aspect of running a firm will continue to be essential, adding that the tools are useless without that touch of humanity.

"While AI is an exciting prospect, that human element of an accountancy firm can't be replaced. We know who our clients are and understand them as individuals, so we can't completely rely on machine learning."



## Will Cole

community and editorial assistant, AccountingWEB

## Chapter 03

# Getting people on board with innovation

Staff and clients may be resistant to change but by presenting it the right way you can encourage them to embrace new situations and reap the benefits.



Lucy Cohen  
co-founder, Mazuma



**A**s human beings, we are hard-wired to dislike change. Our brains put a great amount of energy into protecting us from danger, and often that means convincing us that change, any change, presents a threat to us and so shouldn't be undertaken. This resistance often stems from the brain's predisposition to prefer known over unknown situations as a survival mechanism. When you combine this with the knowledge that all human beings are inherently programmed to be lazy (our innate tendency to be energy efficient can often manifest as a desire to maintain the status quo, a phenomenon deeply rooted in our evolutionary history), then trying to make a change in yourself is monumentally difficult. So, by extension, trying to get staff and clients to adopt change can seem like a herculean task.

*“Our brains put a great amount of energy into protecting us from danger, and often that means convincing us that change, any change, presents a threat to us.”*

But innovation requires not only change by its very nature, but a shift in attitude and process by complete groups of people. Staff, clients and whole industries cannot remain immune to innovation, and in the

past few years, we've seen the accounting profession grapple with the necessity to adapt to potential new disruptive legislation (I'm looking at you, Making Tax Digital), combined with the ennui that repeated delays and naysaying has injected into proceedings.

The Making Tax Digital (MTD) saga has at least revealed something about the accounting profession – we are capable of change and willing to do so at scale. The kicker here is that this change is more often than not pushed by external rather than internal drivers. How many people would have looked to change if MTD hadn't loomed large on the horizon for a while?

There are valuable lessons here, though. Accountants I have spoken to who have seen this as a golden opportunity to streamline their processes, have talked about the positive impact on their bottom line, their ability to service clients more effectively, and upsell compliance work more easily.

So what's worked, and what hasn't? And how do you get through the painful bits quickly so that you can achieve success, whatever that looks like for you? Here is my rundown on how to effectively implement change for success.



### 1. Start at the end

Before you make any changes, think about what you want the end result to look like and write that down. You need to be specific here, so that you can measure whether the changes you are making are successful. Don't just write down “become more efficient” or “make more profit”. You need to articulate your version of success in a very specific way. Try things like “increase EBITDA by 10%”, or “spend every Wednesday out of the office”. This not only gives you a very clear end result to work towards, but in achieving or not achieving it, you can see how successful your project has been.

### 2. Get your team on board

Now that you clearly know what success looks like, you can communicate this to your team. What's important here is to tell them why you want to make the changes and focus the discussion around what's in it for them. I use the WIFM (what's in it for me) approach whenever we need to change things. People find it much harder to get on board with change when they don't understand how it will positively benefit them. Using WIFM as a way of thinking will let you frame changes in a way that makes it easy for your team to see how their life will improve afterward. For example, if your goal

is to increase profits, then you can explain how that will feed into opportunities for staff remuneration. Or if it's to cut down on the number of emails that get pinged back and forth, you can demonstrate how much more time that will leave for staff to do the work they actually enjoy. And even if the goal is for you as the founder to have a day off midweek, even that can be an opportunity for staff to develop autonomy and not have the boss around for a full day – and who doesn't love that?

### 3. Get your clients bought in

If you want clients to change the way they interact with you, whether that's a new piece of software or a different way to get in touch, an email with a link or demo video just won't cut it. You need to pick up the phone and spend some time talking it through with them. Direct communication, such as phone calls, often leads to better client engagement and understanding than impersonal methods, such as emails or video links. WIFM applies here too – a little bit of conversation around the benefits is

often all it takes. When we had a new suite of digital tools to use, we noticed that our longer-standing clients were the slowest to adopt them, even though they would have benefited them the most. Why? They don't read the beautifully crafted emails or watch the demo videos, but they appreciate a phone call to help them set up the new tool. We've seen adoption rise by 20% in just a few months by having a structured plan in place to target those clients – and they're all delighted with the results.

### Change is growth

Remember that change, while often daunting, is really about growth and pushing boundaries. Think back to when you first did a set of accounts on your own, or started in a new job. Sure, it might have been a bit nerve-racking initially, but once you got the hang of it, the feeling was exhilarating.

The same goes for innovation in any profession. So, whether you're tinkering with new software or embracing a new business model, approach it with an open heart and a

dash of curiosity. And hey, if ever in doubt, just reach out to your fellow accountants. We're all navigating this whirlwind of change together, and sharing insights, successes and even the occasional hiccup can only bring us closer as a community. Cheers to embracing the new.



*“Remember that change, while often daunting, is really about growth and pushing boundaries.”*



# Selling the dream to clients

Clients can be equally if not more resistant than staff to innovative changes to a firm. Jo Wood discusses how to ease them into the future.



**F**or firms looking to grow and innovate, change is a scary, yet necessary part of reaching that next level. Whether it's investing in digitisation or exploring a new niche, getting used to the new norm can take time.

For clients who may have grown comfortable with the way things have always been, a change in vision can sometimes ruffle feathers. While your team might be on board with the new direction, clients may balk at the shift in their relationship with you. This is something that Jo Wood has experienced a number of times during her tenure at the head of Jo Wood Virtual FD Ltd.

"Clients are looking for consistency, but while there are people that really like what you're about, they're still resistant to what you want to achieve with them. I guess it's simply because no one really likes to change, do they?" Wood said.

*"Communication is key, we try to make ourselves easily available."*

## Focus on the clients that matter

For Wood, the first place to start is by weeding out the clients you're sure aren't going to be a good fit. Once you have a fully onboarded a client who simply doesn't fit and they're paying their monthly fee, then it's too late.

"You have to be ready to go on that journey with clients from the beginning," Wood continued.

Using what Wood terms "attraction marketing" her firm utilises all the resources necessary to ensure that the clients that fit find her, while the ones that don't steer clear.

And this cut-throat approach not only helps your clients, it's essential to a positive team environment according to Wood. "Clients who don't make an effort are just never going to be happy and that means you're not going to be happy.

"We still get people who come to us who have only used spreadsheets, but they want to do it. They just don't know how to be experts and that's where we can help. But I've been a people pleaser before and it's just not worth it."

**Communicating the journey**

However, even those clients that fit the mould from the beginning can find changes later down the road scary. To tackle this issue, Wood argued for the importance of telling your client in no uncertain terms that you're making these changes for their own benefit.

"The thing we have to remind our clients of is that we're in this relationship because you want change; because something isn't working currently," Wood said.

And it is this taking control of the narrative that Wood believes has helped her win over clients spooked by talks of innovation, adding: "I know how we can serve our clients best, and if that requires change, I remind them to trust the process and the reasons why they came to us."

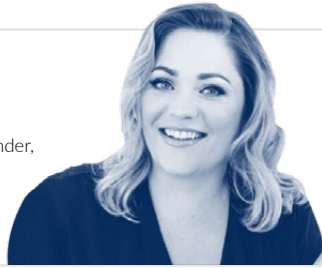
From there, Wood emphasised the importance of continued communication of the message, keeping the client in the loop and making them feel valued, even as things change.

"Communication is key, we try to make ourselves easily available," Woods said.

"We have WhatsApp groups with our clients, and initially when we onboard them, we meet with them every week on Zoom to ensure they're happy with our way of doing things."

**Jo Wood**

coach and founder,  
The 6 Figure  
Bookkeeper

**Be the success your clients want to see**

Wood concluded by noting that one of the best ways you can bring clients along for the journey is simply by showing them the success of joining. For Wood, who recently sold her firm, the fact that she has achieved great success was something that enticed clients to invest in her vision as it mirrors their desires as business owners.

"My clients have been through massive change recently. But what is great is that I was constantly having conversations with my clients about their own exit and how to attain that.

"So actually, the majority of my clients were like, 'Oh, my goodness, you're always talking to me about one day when I sell, and you've managed to do it'. They're happy as we've proved it's possible, so they more become fully invested in our vision."

**Will Cole**

community and editorial  
assistant, AccountingWEB



# Tapping into tech for transparency

Using tools to enhance the communication process with clients and staff makes the process easier for all, and facilitates innovation, says Alex Falcon Huerta.

At Soaring Falcon, we use high-end tools to enhance interactions with both clients and teams. Central to this is a tech tool Confluence – a platform where we store our step-by-step processes. This is our go-to tool where we have documentation for the company and clients. We share our workflows for each service we provide, together with a heat map. The heat map shows clients and the team where we experience high levels of work – mainly due to the timing of deadlines within the practice. Then we can prepare as much in advance to reduce the pressure. This also keeps things transparent and closes any expectation gaps. The workflow reminds clients about additional services we offer. It creates opportunities outside accounting and compliance.

Our communication process is primarily carried out using video content via Twiso.

It breaks down meeting discussions into action points and summarises the conversation using AI. This application extends to both client and team meetings, with records organised in folders for easy access by our team and clients.

### Easily digestible

Having the videos together with the documented process, provides our onboarding process for new members with easily digestible content. The same applies to clients exiting and new – we simply share the footage and highlight areas they have requested information on. Easy-to-follow videos are personalised on their data.

Having the documentation in place allows for any team member or client to have access from wherever they are. Clients are on the go and the team has the option to work from

various locations around the world, so they don't need to wait for the UK time zone for an answer on how to do a certain task.

*“It's important to bring in tools to remove work that can be done automatically.”*

### Offering support

Part of our client and team onboarding is to record not only the accounting areas, but also areas where we can jump in and support the client in any way. This may include things such as ticket support and administrative tasks.

It's important to bring in tools to remove work that can be done automatically. This allows the team or client to spend time on areas that are more of a focus point to them.

Time and work commitments are flexible to allow for staff to take time off when it's important to them. The cloud solutions we have in place allow the clients and team to work with freedom, either in the office or by the beach.



**Alex Falcon Huerta**  
CEO, Soaring Falcon Accountancy

## Nathan Embleton explains how Blu Sky meets objectives

FIRST STEPS

**When part of a forward-thinking and innovative firm, it's likely your processes and systems are changing throughout the year. Resistance to change is a challenge all business leaders face.**

It's important to get your team excited and invested in the strategic decision-making of the business that drives change. We involve the whole team in quarterly strategic workshops that set out our current objectives and key results. The individual objectives are then set across the team ensuring that, if each team member hits their objectives, then the overall objectives of the business will be met.

If the team are onboard, then the enthusiasm is evident in our overall service provided to our clients.



**Nathan Embleton**  
client relationship director,  
Blu Sky

# Bringing others along for the ride



Ensuring that staff and clients remain onboard with the firm's vision, is all about consistency says Ad Valorem co-founder Nikki Adams. That's why the firm's mission statement remains the same while the business evolves.

Change is a necessary part of growth for the forward-thinking accounting firm. This can be an exciting time for businesses, as they take that next step up the ladder of success, however, others may not share your optimism.

For staff, who may have worked a certain way for years, and clients, who have received the same service for just as long, a shake-up can be a worrying prospect. With that said, how can you ensure that everyone is singing from the same hymn sheet when it comes to practice growth?

This is something Nikki Adams, co-founder of Ad Valorem and previous Practice Pioneer

Award winner, has contended with multiple times as her firm has evolved. Striving for continuous improvement with a particular focus on modernising small or medium-sized enterprise (SME) accounting, Adams has seen her firm change a multitude of times over the years, meaning that ensuring everyone has bought into her firm's changing vision has been essential.

## Setting out the vision

For Adams, the very base of any strategy is setting out the vision. In doing so, Adams argues that both staff and clients have something tangible to believe in, and that vision starts with you.

"Last year we bought a more traditional firm and we thought, 'You would not put our two firms together.' But they chose us out of a choice of five. And when I asked them, 'Why did you pick us?' they said that when they came to our office they could see our vision and see the future of the profession," Adams said.

And it's this focus on building that vision from its "embryonic stage" as Adams notes, into a mission that can be seen across the business in a 'show, don't tell' way that then trickles down and inspires the team to reach new heights.

"For our staff, all they have to do is look at the senior management team. All of them started in different roles and worked their way up the ladder into new specialisms, which highlights our commitment to developing a great team. That's where we've seen the buy-in from our staff."

## Consistency is key

Yet, even after setting out the vision for the firm, Adams admits getting people on board wasn't a smooth process, adding that Ad Valorem "100% has come up against resistance when making changes."

However, Ad Valorem has employed a range of strategies to ensure that staff and clients remain onboard with the firm's vision, with Adams adding that consistency is key.

"It's always about having that consistent message. We've always been about modernising SMEs and, across the senior management, our core vision hasn't ever changed."

To ensure this consistency, Adams and the team engrain the message into every facet of the business and are in constant communication with the team and their clients when things change. "Whether it's in our weekly 'town hall' meetings as a team, inductions for new employees or onboarding new clients our message and mission statement stays the same."

Adams finished by noting that while consistency is key, it means nothing unless there is passion from those who set out a firm's vision. "It's very difficult sometimes when you're doing the work, getting beaten up by clients, and are right on the front line the whole time. Which is why you need to be passionate about what you're doing. Discover what excites you and that will be seen by everyone you work with."



## Will Cole

community and editorial assistant, AccountingWEB



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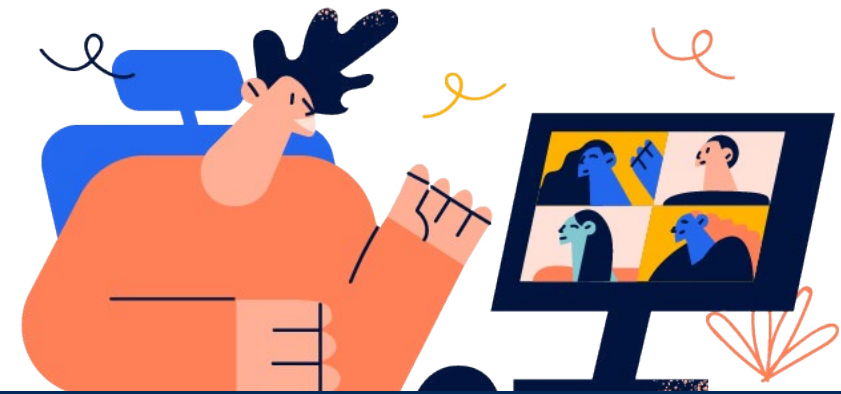
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