



How to make more....

The thing I'm going to do differently as a result of this session is.....

This sheet contains a summary of all of the ideas on this topic contributed by those who have heard me present this talk recently. Thanks to those who contributed.

- 'Blame' HMRC for bad things such as disallowances – make it more obvious that we're on client's side
- 'One in – one out' – great idea
- Adapt our letters to include a standard additional paragraph each month
- Adopt two step approach – to highlight what we do
- Ask clients for feedback
- Ask clients what we did well and what we could have done better
- Ask for recommendations more vigorously
- Ask my people how they are billing etc, as per the lecture
- Assess individual clients on a more pro-active basis for their needs
- Be more choosy about the networking events I attend and spend more time with A-list clients
- Become even more pro-active
- Bin my worst clients
- Categorise clients
- Collect monies more quickly and consider AVN
- Communicate more regularly with my A list clients to ascertain their needs
- Communicate what we do to clients to justify our fees
- Consider extra increases in fees for D-list clients or sack them
- Consider practicable basis for fixed fees or ranges
- Consider standard calculations or topics which can be broached with a number of clients
- Consider UKtaxworld email newsletter
- Consider UPB
- Critically review my client list
- Detailing more specifically work carried out and tax savings
- Details on letters the tax savings we have made for clients
- Diarise time and stick to it to implement suggestions picked up today
- Discuss buying in mailshots
- Effectively and actively set aside 'marketing time' each week (with existing clients)
- Encourage greater communication with clients to help save them money and to make more money ourselves
- Ensure I train my key staff to become tax STARS
- Ensure timely billing is carried out
- Explain to the client what it is we do for them
- Explore areas where we can develop existing clients
- Focus more attention on my A-list clients (when I've worked out who they are)



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- Focus more on my clients' needs and what I do and how for my clients
- Focus on clients' objectives and the way we fulfil them
- Get tax credits on board
- Grade clients
- Identify some of my best and worst clients
- Introduce agendas for client meetings
- Introduce client feedback to get testimonials
- Invoice clients with tax returns
- Look at my client list from a slightly different angle ie: for opportunities and for those who I haven't spoken to for a while
- Lots!
- Make decisions that will benefit me even if we lose the poorer clients as a result
- Make more time to concentrate on me and my business
- Make our fixed fee quotes conditional
- Make sure I tell clients how much tax I'm saving them
- Maybe amend structure of letter of engagement to clients
- More care with fee pricing and billing to pick up extras
- More emphasis on client contact and reduce 'backroom' work
- Obtain testimonials and look at sending out a newsletter
- Offer existing clients more services
- Phone clients more often
- Provide more proactive advice
- Reconsider billing practice
- Reduce focus on 'time on the clock' and bill what it's worth
- Reduce lock-up though more regular billing
- Replace the word 'compliance' with 'helping the client'
- Review 'own' benchmarking info
- Review billing structure and frequency
- Review clients' needs in a different light
- Review credit control and move to become more efficient
- Review the 'd-list' clients
- Review what we do for clients and whether they actually want us to do it for the fee charged (eg: full accounts to income and exp account when clients don't need or read full accounts)
- Roll out good procedures across the entire firm
- Schedule one day a quarter for looking to call and visit clients – look for opportunities etc
- Send bills with tax returns
- Set clients up to pay by direct debits
- Show clients where and when we are saving them tax
- Spend more time helping existing clients rather than wasting time trying to find new clients
- Start a book of testimonials
- Stop sending out Budget booklets
- Structure delegation
- Structure more marketing effort on existing clients



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- Suggest we reduce credit terms from 30 days to 14 days (espec as new bonus scheme is based partly on reducing lock-up)
- Tell clients that I'm saving them tax
- Think about how I communicate with my clients and when (as a sole practitioner it's easy to bury yourself in comfortable technical work)
- Try out the Tax Advice Network next time I need to check something with a specialist
- Try to do at least one thing differently in line with suggestion on slides
- Try to identify other areas where clients can be helped other than focusing on the obvious
- Try to obtain feedback from clients
- Try to think more like a client
- Use the VICCIOUS acronym
- Utilise clients more for obtaining more work
- Whilst we bill with draft accounts and tax returns already we need to make it clear to clients that we will not submit them until paid!
- Work through the action plan on final slides

Please note that by sharing contributors' views I am neither endorsing nor condoning any of them. But I'm sure you'll get some value from knowing what others do and by comparing your own approach.

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