

Accountant Ratings & Service Levels

A Class Accountant:

- Has vision and growth plan For their practice - actively working to achieving set aims
- Recognises that clients are demanding (wishing For) a seamless accounting/financial services/advisory package
- Consistently refers at least two clients per month every month
- Views relationship with [XYZ Financial Services] as a partnership and demonstrates commitment to working collaboratively For the benefit of both parties
- Cultural Fit – upholds similar values and a client relationship management ethos that mirrors that of [XYZ Financial Services]

A Class Accountant Service Standard:

1. Hold weekly meeting in their office to facilitate information sharing and provision of leads. Facilitated by [XYZ Financial Services] partner lead
2. Collateral provided to firm on a monthly basis – information that is relevant to their business or of interest value to partners
3. Business Value Add – assistance on a business tool that directly impacts business performance provided on a quarterly basis. Includes, assistance with marketing tools/ideas as appropriate
4. Training and Professional Development Support - ie pension or other technical issues workshops provided six monthly
5. One client referral back to the accountant per quarter
6. Quarterly evaluation and review of relationship (statistics, ideas to improve results for them and us) ½ day
7. Client seminars – first in list to be offered client places at [XYZ Financial Services] events
8. Response to any other request for assistance within 24 hours

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B Class Accountant:

- Have a quality existing business, but no plans for growth.
- Recognises that clients from time to time will need access to quality advice based financial planning
- Prepared to make some commitment to work with [XYZ Financial Services] - lacking ability to gain traction
- Refers at least one client every two months
- Is in a position to provide alternate value-add to [XYZ Financial Services] - perhaps referrals to other accountants and facilitate access to speaking engagements
- Cultural fit - upholds similar values and a client relationship management ethos that mirrors that of [XYZ Financial Services]

B Class Accountant Service Standard:

1. Weekly phone call to facilitate information sharing and provision of leads
2. Standard Partnering System processes and procedures
3. Collateral provided as appropriate - information that is relevant to their business
4. Training and Professional Development Support - ie pension or other technical issues workshops provided six monthly
5. Client seminars - second in list to be offered client places at [XYZ Financial Services] events
6. Yearly evaluation and review of relationship (statistics, ideas to improve results for them and us) ½ day
7. Response to any other request for assistance within one week
8. Annual letter to the senior partners outlining our success with accountants in the previous 12 months (providing some hard statistics and facts to reinforce the value we have added to the accounting firms)

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C Class Accountant:

- An infrequent referral source – refers less than one client per quarter.
- Is in a position to provide alternate value-add to [XYZ Financial Services] – perhaps referrals to other Accountants and facilitate access to speaking engagements

C Class Accountant Service Standard:

1. Monthly phone call to stay in touch
2. Standard Partnering System processes and procedures
3. Client seminars – third in list to be offered client places at [XYZ Financial Services] events
4. Response to any other request for assistance when [XYZ Financial Services] can accommodate
5. Annual letter to the senior partners outlining our success with accountants in the previous 12 months (providing some hard statistics and facts to reinforce the value we have added to the accounting firms)

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D Class Accountant:

- [XYZ Financial Services] decide after a suitable time period that we are not currently able to work with them.

D Class Accountant Service Standard:

1. Annual letter to the senior partners outlining our success with accountants in the previous 12 months (providing some hard statistics and facts to reinforce the value we have added to the accounting firms), asking them if they wish to speak with us again.

They will need to call us to initiate this next step

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