



UKU

5

METHODS

**TO INCREASE YOUR ACCOUNTING
FIRM'S EFFICIENCY DRASTICALLY**

WITHOUT ANY SOFTWARE



Who wouldn't want to do less work for more profit?

We have talked with hundreds of accounting offices to **map their work processes, prepare work plans, solve their problems**, and make the **company more efficient**.

Therefore, we are well acquainted with the essence of accounting firms and know the problematic areas of the field well. We know an accounting office can succeed even without software.

Based on our experience, we wrote down **five ways** to make your accounting office **more successful without using the software**.

However, if you want the help of a software, [book a demo here](#) with Uku's digitization expert Triin, who will tell you more about automating workflows and increasing the company's profit without additional work.

1. Design your client's onboarding journey

A **satisfied and well-served client** will not hurry to change accounting service provider after a cheaper offer and will most likely **recommend** your accounting services to friends looking for a service provider. Happy clients are the foundation of your company's **sustainability and growth**.

Why plan your client's onboarding process?

A **well-planned onboarding** process ensures that all necessary information about the client is at hand and the accountant can work without obstacles. In addition, your new client feels that **well-organized professionals** provide the service.

Multiple employees are often involved in the client onboarding process, so the tasks performed during the process are not linear. **By mapping out your onboarding**, you can visualize what needs to be done and which employees are responsible.

Accurate planning makes delegating tasks to the **right person** at the **right time** effortless.



Here's an example of which steps could be in a client's onboarding process:

☒ **8 tasks selected** [Hide others](#)

Once

<input checked="" type="checkbox"/>	Background check	NEW CLIENT ONBOARDING	07/02/2023
<input checked="" type="checkbox"/>	AML process	NEW CLIENT ONBOARDING	07/02/2023
<input checked="" type="checkbox"/>	Contract	NEW CLIENT ONBOARDING	07/02/2023
<input checked="" type="checkbox"/>	Updating Uku profile	NEW CLIENT ONBOARDING	07/02/2023
<input checked="" type="checkbox"/>	Assigning rights	NEW CLIENT ONBOARDING	07/02/2023
<input checked="" type="checkbox"/>	Setting up accounting software	NEW CLIENT ONBOARDING	07/02/2023
<input checked="" type="checkbox"/>	Setting up billing	NEW CLIENT ONBOARDING	07/02/2023
<input checked="" type="checkbox"/>	Setting up monitoring	NEW CLIENT ONBOARDING	07/02/2023

[CANCEL](#) [SAVE](#)

An example of a client's onboarding process work template in Uku

The onboarding process also includes a **smooth flow of emails**. For the client to understand and transfer their data quickly, create a communication flow with the emails you need to send to the customer. The letters include and specify the data and documents your client needs to forward you to start working together.

Fast, convenient, and **effective** communication ensures an excellent first impression.



2. Create an employee onboarding process

Happy employees are the basis of an effective working environment. A comfortable and delightful working environment is an essential factor in employee well-being.

Onboarding without a mapped-out process can be **uncomfortable** for a new employee. For example, when ordering supplies, some things were forgotten, and now the new employee is missing a door card or does not have a place to check the office's rules. Make a document or a folder where all the information is collected for a comfortable onboarding process.

A new employee's first few inefficient days are inevitable, but it is possible to speed up the employee's onboarding with a **systematic flow**.

How to do it most effectively?

Ask **existing** employees about their onboarding period:

- Did you feel supported when you started work?
- What are the essential tools for your work?
- Did you get the right tools to do the job, or did you have to ask for something extra?
- How could the management have made your onboarding process more comfortable?
- What do you think a new employee needs to know?



An employee onboarding process could consist of the following steps:

☒ 8 tasks selected [Hide others](#)

Once

<input checked="" type="checkbox"/>	Prepare tools and accounts	ADMINISTRATION	07/02/2023
<input checked="" type="checkbox"/>	Introducing the office and colleagues	ADMINISTRATION	07/02/2023
<input checked="" type="checkbox"/>	Setting up tools and creating accounts	ADMINISTRATION	07/02/2023
<input checked="" type="checkbox"/>	Introduction of office rules	ADMINISTRATION	07/02/2023
<input checked="" type="checkbox"/>	Training materials	ADMINISTRATION	07/02/2023
<input checked="" type="checkbox"/>	Discussing expectations and introducing job duties	ADMINISTRATION	07/02/2023
<input checked="" type="checkbox"/>	Introducing their mentor	ADMINISTRATION	07/02/2023
<input checked="" type="checkbox"/>	Introducing the management	ADMINISTRATION	07/02/2023

[CANCEL](#) [SAVE](#)

Näide Ukusse sisestatud töötaja liitumisprotsessi mallist.

When a new employee settles in quickly and gets to know the tasks, the **quality of their work increases** soon. It is much easier for other employees and the management if the newcomer has everything important written down and in front of them all the time, for example, the organization of vacations and schedules, office rules, etc.



3. Ask for feedback or recommendations

If you want to buy a new home appliance or are looking for a service provider, it is always wise to **ask a trusted person for advice** — the same with an accounting service. If a client is happy and satisfied, there is a **high probability** that they will **recommend you** when someone asks them about accounting services. Don't be afraid to encourage clients to recommend your company to others.

You can also **ask trusted clients for recommendations**. Feel free to research companies with similar challenges as your current clients. Here is an email template asking for a recommendation to make the process as easy as possible.

Reference request letter template

Subject line: **Could you give us a referral?**

Hi **[Name]**,

We were glad to hear from the recent survey that our services work so well for your team. Our main goal is to offer financial confidence and peace of mind to businesses like yours.

We're currently expanding our capacity and could take on a few additional customers. Would you know anyone who'd be a good fit?

[Set some limiting terms about the company size, sector, etc. if needed]

We'd appreciate any suggestions and introductions.

Thanks again for your trust and help!
[Your name, title and company name]



3. CLIENT RECOMMENDATION

Positive feedback on Google, Facebook, or other feedback sites, is also an excellent way to demonstrate **trustworthiness**. You can show your skills without contacting a potential client directly.

Here's an email template for you to use to ask for a review:

Subject line: **How are we doing?**

Hi **[Name]**,

Thanks for trusting us with your books! We work hard every day to make your life at least a little bit easier.

If you're happy with our services, can you please leave a quick review on **[platform with link]**. Just click on the link, log in, write a few sentences and click submit.

We really appreciate your feedback and time!

Thank you in advance!

[Your name, title and company name]

Email template



4. Take advantage of email marketing

Emails make it easy to send information to many people at once. Here are a few good ideas to communicate to clients via email:

Remind the clients of all the services you offer

Once the company has expanded and started offering **additional services**, it's a good idea to remind existing clients about your extras from time to time and let leads know about them as well.

Keep clients informed

Take advantage of the **newsletter** structure to notify clients about changes that may affect their financial situation, such as tax changes.

As a bonus, add a section on support measures that the state or other institution offers that this particular client has a real chance to receive.



Look after your lead clients!

Pay attention to potential clients and create a communication flow for them too. Future communications must include an initial welcome letter. If they don't immediately become your client, send a reminder a few days or maximum a week later.

Add potential clients to the list of newsletter recipients

Create a separate group for potential clients, and add an attractive offer in each letter.

The onboarding process starts when the client accepts your offer.

Repeatedly reminding a potential client of yourself is perfectly justified.

For example, marketing uses the principle that a person has to see information six times before it becomes fixed. This means a bold attempt is destined for success!

Make offers

A slightly cheaper plan will not damage your company in the long run, but in the eyes of the customer, it shows **kindness** and increases the company's **value**.



5. Bill additional work

Don't do extra work for free

Mainly, accidental free additional work in an accounting office is done in two ways.

1. Work that is outside of the scope of the contract

The first is when the customer needs additional services not agreed upon in the fixed-price plan. For example, the client wants to open a new bank account, lease three new work vehicles and buy an apartment as an investment. These jobs have a direct impact on the time spent on monthly accounting. Feel free to ask for extra money for additional services.

2. The agreed volumes/package exceeds the limit

The second is where the fixed-price package breaks, i.e., more time is spent on the customer than was agreed upon in the fixed package. To solve this, identify all the work done for the client and analyze how the accountant did it.

Write down even the **most minor tasks**, such as repeatedly asking for documents, so you can see how much work was done for the client. Everyone's time has a price, so it's wise to use software that measures time for completed tasks.



Provide additional value to the client

Find out whether there are any extra tasks your accountants could do for a client to offer more value to the client and earn additional revenue — for example, **business analysis** or accounting **consulting** in addition to accounting.

In the case of an additional service, the client can catch several birds with one stone and bring more money to your company. It is also possible to offer, for example, **meeting rooms for rent**.

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Want your accounting firm to be even more successful?

A practical software can help you even further!

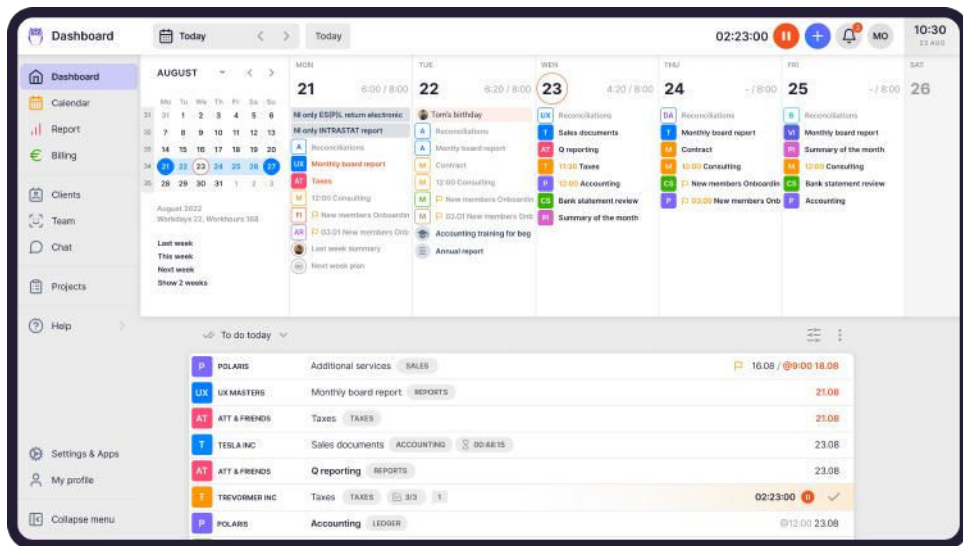
One of the top software among accountants is Uku.



How to become even more efficient?

Use the help of Uku - TOP work management software for accountants in Europe

- Convenient **time tracking** provides a clear overview of the working time spent by clients, projects, and tasks.
- Automated client-specific **work plans** and built-in **CRM** ensure timely completion of work, increasing service quality.
- Comprehensive **reporting** and efficiency analysis will take your accounting office to a new level.



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