



# The 4 essential ways to grow your accounting firm

[karbonhq.com](http://karbonhq.com)



- 1. Close down any apps**
- 2. Ask questions any time**



# Meet your hosts



**Richard Snell**

Karbon  
Sales Director



**Ed Chan**

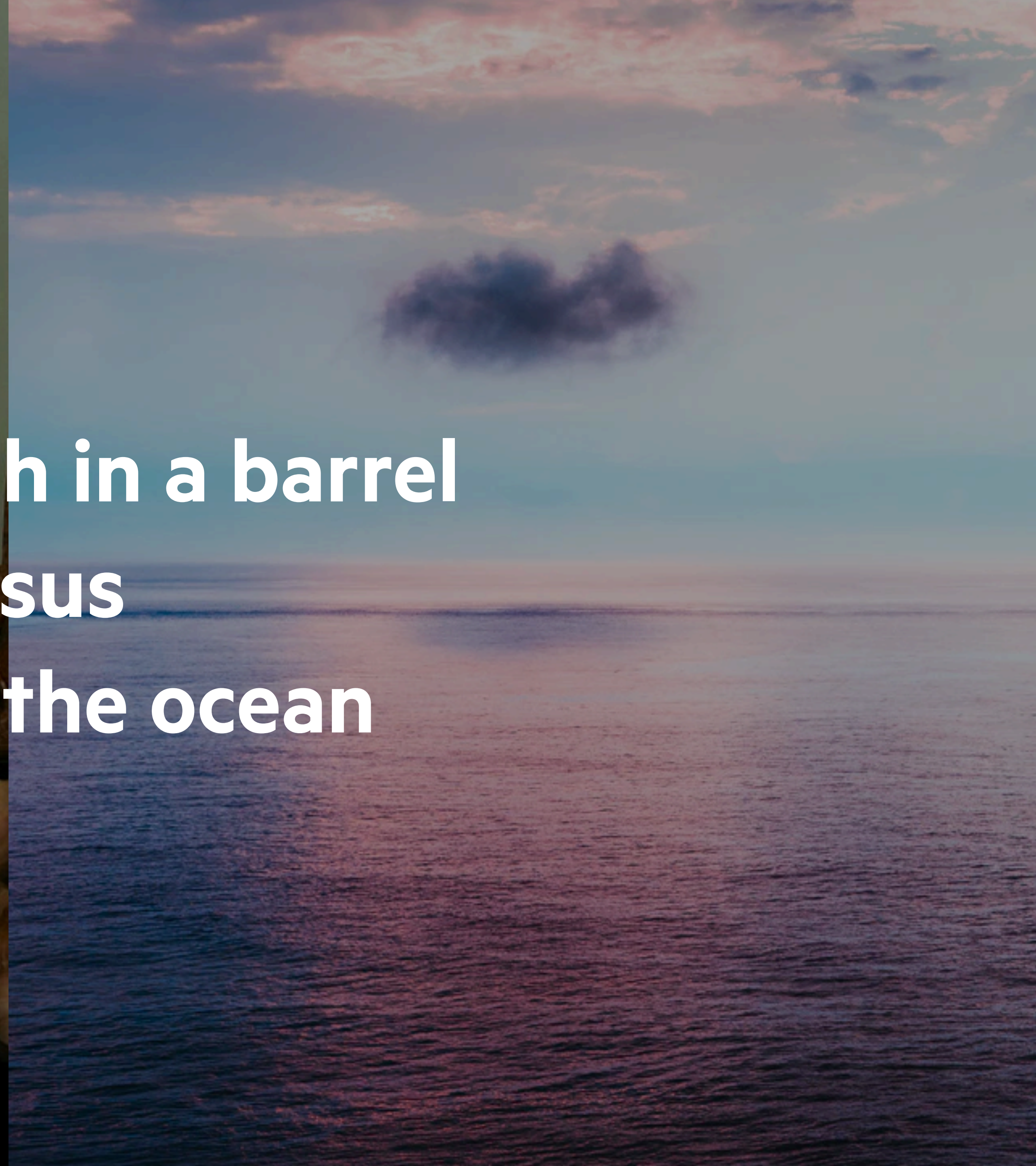
Chan & Naylor  
WIZE Mentoring







# Shooting fish in a barrel versus fishing in the ocean





# 4 ways to grow your firm

1. Client referrals
2. Focus on your monetisation sheet
3. Digital marketing
4. Mergers and acquisition



# Client referrals



# Driving referrals from the customers you want

- Client Manager review
- Client approval meeting
- Finalisation
- Pack up the job
- Signature and return to us
- Lodgement
- After service care & send job > After lodgement. Each sub is its own email
  - Client NPS
  - Google Review invitation & referral request
  - Upsell services
    - Email: eg. Review of loans and wealth creation



# Your monetisation sheet





# 4 ways to grow your firm

1. Client referrals
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3. Digital marketing
4. Mergers and acquisition



# Digital marketing





# Digital marketing

- Accounting versus selling
- See marketing as an investment versus an expense
- Three roles to fill: grinder, manager, strategist
- Pay an agency for the strategy and hire a grinder to execute
- Don't switch off your marketing, increase your production



# Mergers and acquisitions





# Mergers and acquisitions

- The seller's market
- What makes a successful merger or acquisition?
- If you want your acquisition to succeed, don't make immediate changes
- Overheads drop as turnover increases



# Start to grow your firm today

- Immediate gains
  - Referral strategy
  - Monetisation sheet
- Mid-term gains
  - Digital marketing
- Long-term gains
  - Mergers and acquisitions





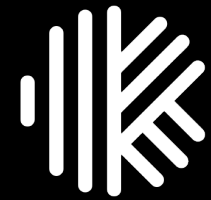


# Get the playbook

Discover the proven method to turbocharge your firm's growth without it collapsing when you're not there.

 [karbonhq.com/a-team](https://karbonhq.com/a-team)

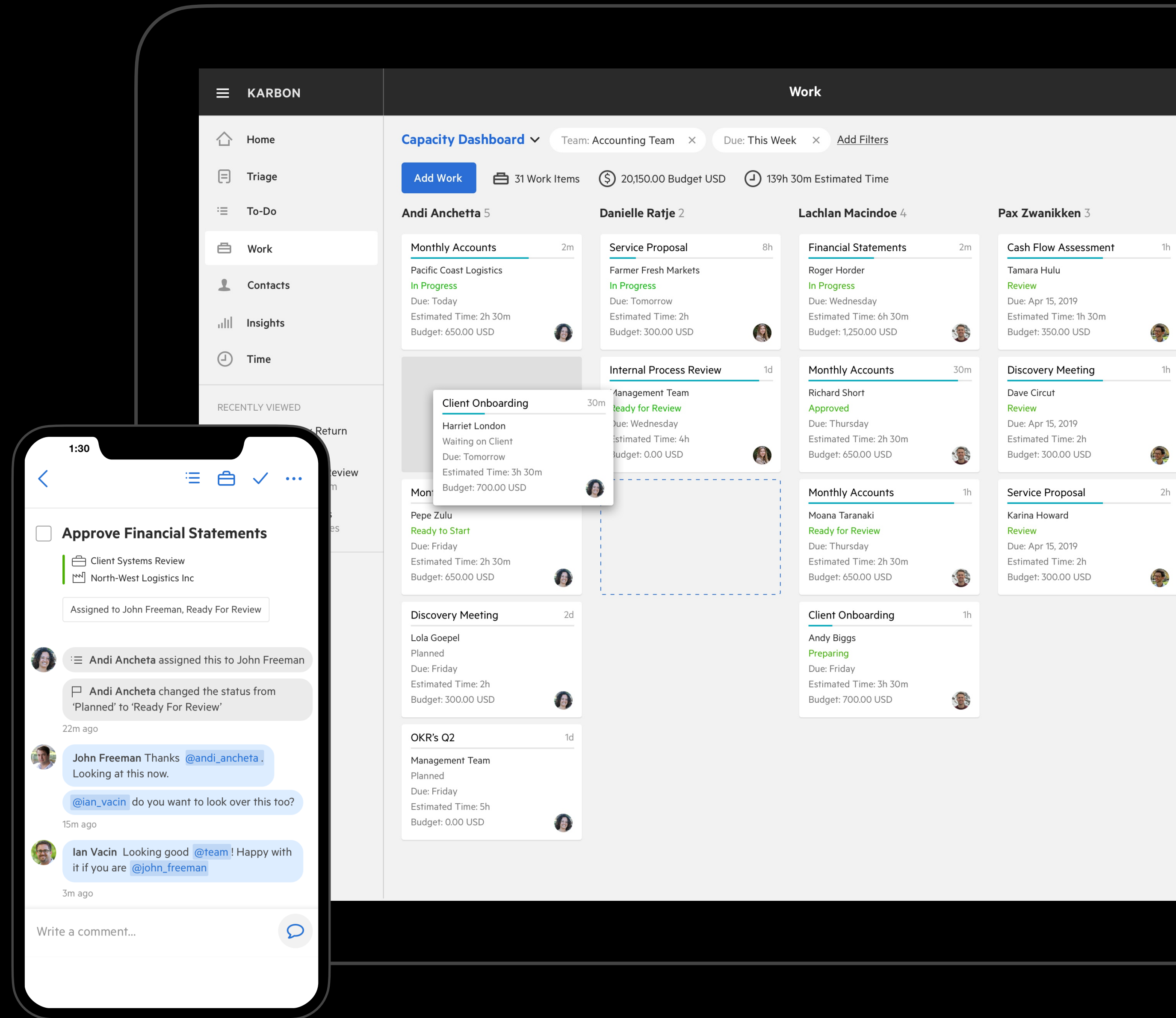
**FREE DOWNLOAD**



# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED





# Questions



# Thank you

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[richard@karbonhq.com](mailto:richard@karbonhq.com)

