



Accountant Ratings & Service Levels

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A Class Account:

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 Service Standard:

Hold weekly meeting in their office to facilitate information sharing and provision of leads. Facilitated by [XYZ Financial Services] partner lead

Collateral provided to firm on a monthly basis – information that is relevant to their business or of interest value to partners

Business Value Add – assistance or a business tool that directly impacts business performance provided on a quarterly basis. Includes, assistance with marketing tools/ideas as appropriate

Training and Professional Development Support - ie pension or other technical issues workshops provided six monthly

One client referral back to the accountant per quarter

Quarterly evaluation and review of relationship (statistics, ideas to improve results for them and us) ½ day

Client seminars – first on list to be offered client places at [XYZ Financial Services] events

Response to any other request for assistance within 24 hours

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B Class Account:

Has 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

B Class Service Standard:

Weekly phone call to facilitate information sharing and provision of leads

Standard Partnering System processes and procedures

Collateral provided as appropriate – information that is relevant to their business

Training and Professional Development Support - ie pension or other technical issues workshops provided six monthly

Client seminars – second on list to be offered client places at [XYZ Financial Services] events

Yearly evaluation and review of relationship (statistics, ideas to improve results for them and us) ½ day

Response to any other request for assistance within one week

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 Account:

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 Service Standard:

Monthly phone call to stay in touch

Standard Partnering System processes and procedures

Client seminars – third on list to be offered client places at [XYZ Financial Services] events

Response to any other request for assistance when [XYZ Financial Services] can accommodate

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 Account:

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

D Class Service Standard:

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