

**clarity.**<sup>®</sup>



**How clarity. gave Carl Postians' startup the focus, direction, and confidence to grow the accounting firm he always wanted**



## About Capo Digital Accounting

Capo Digital Accounting was founded in March 2020 and specialises in serving construction, real estate and property clients throughout the UK. The team consists of three full-time senior accountants and part-time consultants.

Working exclusively online, the firm prides itself in not only covering all their clients' compliance needs, but truly understanding their issues and challenges and helping them realise businesses and personal goals.

We spoke with Carl about startup life and why he chose Clarity to help his firm.



[capoaccounts.co.uk](http://capoaccounts.co.uk)

## Highlights

- ✓ The Getting Clear workshop was the best value consultancy that money could buy!
- ✓ From the first two meetings I had with clients, I sold two insights packages (£257/month each) which I knew would already pay for my Clarity subscription at Starter Plus level
- ✓ It's reassuring to know that I'm speaking with fellow accountants who speak my language and have experienced most of my challenges before
- ✓ Clarity has given me the confidence to deliver the services that I'm most passionate about and the results speak for themselves
- ✓ Our clients love the accountability, action plans and hands on approach that we can now deliver
- ✓ I am now more selective over which clients I take on as I only want to work with those interested in growing their business
- ✓ It is worth every penny! Even if you are just starting up, do not see this as a cost. It's the best investment you can make in your firm
- ✓ The Clarity team are fantastic. There's nothing I can't ask them that they can't help with

## About you and your firm

I joined the Royal Navy straight from school and after 24 years, when it was time to leave the forces, I wanted to do something that gave me the same rush and sense of achievement.

Many small businesses in my area started with redundancy pay-outs, after workers lost their jobs in the steel and coal industry. They were honest, hard working men and women with little knowledge of business. The lucky ones failed after a couple of years, others went on for a few years more, racked up huge debts and then failed, leaving them penniless.



The practice I worked at was solely compliance and only operated manual bookkeeping systems and spreadsheets for accounts and tax returns. So I started Capo Digital Accounting in March 2020 because I saw a gap in the market, and looked at business advisory as a way of helping these businesses become successful.

Not many firms are offering advisory or business support services in South Wales. I want to be a pioneer, set high standards and leave a legacy of being one of the reasons why small businesses are successful.

Outside of work, I am an avid beekeeper, I play golf very badly and occasionally wear myself out on the squash court. I support Newport Dragons when they win, and keep quiet when they lose.

## How did you get started with Clarity?

**I started by joining Clarity's Getting Clear workshop.** As a start-up I have to be very careful of my time and my money but the workshop seemed like it would be a great use of both.

Not only could I gain access to the Clarity platform, at a fraction of the price of a normal month's subscription, I was also able to have four impactful and eye-opening sessions with Steven and Aynsley. **This was the best value consultancy that money could buy!**

Knowing that I was learning from two business owners who have been there and done it in the profession, rather than listening to software salespeople, made a huge difference.

It was also a brilliant experience to be there with other accounting firms on a similar journey or further ahead than I was. The accountability and collaboration in the group inspired action and helped me achieve immediate results.

## What results did you get from the Getting Clear workshop?

Throughout the series, you are encouraged to take action straight away. I identified the clients in my portfolio that I thought might be interested in growing their business and sent out the simple report to engage with them.

I was really pleased that 2 out of 3 of the reports I sent out got immediate responses and I was able to book in meetings right away. I wasn't sure whether my existing client base would want this type of service, but I have quickly learnt not to make any assumptions. I now know that sometimes I've got to get out of my own way!

**From the first two meetings I had with clients, I sold two insights packages (£257/month each) which I knew would already pay for my Clarity subscription at Starter Plus level.**

By the end of the workshop it was a no-brainer that I would sign up to Clarity for the long term and was excited to find out about the extra support, systems and events that I knew the Member Success Team would provide me with.



## What happened before Clarity?

I used to spend hours most days researching different apps to use! I would read numerous forums in the various groups that I'm a part of and think that I needed to try everything.

**It made me feel uncertain about what direction I wanted to take my firm in and how I could possibly get my head around all of the apps that other accountants seem to be using!**

As most start-up firms tend to do, I was taking on any work and clients that would come my way and the only thing I could compete on was price. At times this was de-motivating as it meant I was delivering services that I knew weren't valued and I was frustrated because all I wanted to do was help business owners grow their businesses.

## How has Clarity transformed your firm?

Since choosing Clarity, it's given me the confidence to deliver advisory services to my clients and give real value when talking to prospects. Working with Sam, in the Member Success Team, I know where I'm going as a firm and I have someone to talk to about it. It can be lonely being a business owner! Most importantly, he holds me accountable to take action too and the results are starting to speak for themselves.

**In my opinion, Clarity is much more than just another app.** It is great to have a community of forward-thinking accountants to ask questions to and the member-only events and support, are second to none. I attend every single Clarity member-exclusive event so that I can learn as much as I can from the Clarity team and collaborate and share with their amazing members.



In my one-on-one sessions with Sam, we cover everything from sales and marketing to confidence and systems. **It's reassuring to know that I'm speaking to a fellow accountant who speaks my language and has experienced most of my challenges before.**

He even got me out of my comfort zone to record videos to send to my clients. I don't know what I was worried about, now I enjoy them nearly as much as my clients do receiving them!

Clarity really has changed my outlook and aspirations. It's given me the confidence to deliver the services that I'm most passionate about, and the results speak for themselves. I am now more selective over which clients I take on, as I only want to work with those interested in growing their business. **Even my family have seen a change in me and my happiness!**

## **How has Clarity made a difference to your clients?**

**By taking clients through Clarity, we have created so many "eye-opener moments".** The genius is the simplicity of breaking down their figures into 7 key numbers. And this has made many of them understand their numbers for the very first time.

It builds excitement in their businesses again and gets ideas flowing. Sometimes the conversations go in a completely different direction than I would have predicted. I have been able to uncover huge ambitions, plans for exit or acquisitions and amazing personal targets, which then allow me to tailor the services and advice that I can give.



During COVID, Clarity has also been a brilliant tool to keep an eye on the health of all of my clients, whether they are paying for additional advisory services, or not. Using the Clarity Portfolio View allows me to be proactive in spotting problems before they become insurmountable.

**Our clients love the accountability, action plans and hands-on approach that we can now deliver.**

## Are you using Clarity to help win new clients?

Clarity is helping us to get our value proposition across to new clients. It helps us to stand out and it's so completely different to what most business owners are used to, or would expect. And they love it!

We've won clients from much bigger accounting firms, who it turns out have never spoken to them more than once a year and only ever about their accounts or tax. **Clarity provides me with a great unique selling point (USP) and also helps me to get to know the business owner very quickly, which makes building the relationship so much easier.**

## What would you say to anyone thinking of joining the Clarity community?

**It is worth every penny! Even if you are just starting up, do not see this as a cost. It's the best investment you can make in your firm.**

Clarity is not just another software platform. It educates. It builds confidence. It provides structure. It's a support network. It's consultancy. It is absolutely value for money at whatever stage you are in your firm.

As long as you are willing to take action, you will get results. And your clients will love you for it!

And if you're still not sure, get started on the Getting Clear workshop. The longer you wait, the longer your clients aren't getting the help and support they want and need!





# We help you tell better stories with numbers

Clarity® is the complete business advisory platform that can help you introduce and create a profitable, repeatable and scalable business advisory service for your firm.

Our multi-award winning solution creates an additional revenue stream in excess of 40% for you, whilst increasing your bottom-line profitability by 125%.

In the past, business advisory hasn't properly leveraged the right combination of people, process and technology. It has been heavily reliant on partners or managers to deliver, there isn't enough time, it's difficult to scale and only the top 10/20% of clients can typically afford it.

Using Clarity adds significant value to your small business clients, at a price they'd love to pay.

Clarity combines the power of:

- a technology-led platform - to do the heavy lifting;
- hi-impact systems and processes - getting the same great result every time for the firm and client;
- education, implementation and accountability programmes- beyond advisory, helping you and your firm; and
- member events and a vibrant community - empowering your team, firm and clients to achieve success.

## Contact us

Why not book a discovery call with one of the team to see what a difference Clarity could make to your firm?

[www.clarity-hq.com](http://www.clarity-hq.com)