

clarity.[®]



How **clarity.** provides the structure, education and framework - allowing Kinder Pocock to grow sustainably and provide the services they really want to deliver


**kinder
pocock**
a refreshing change

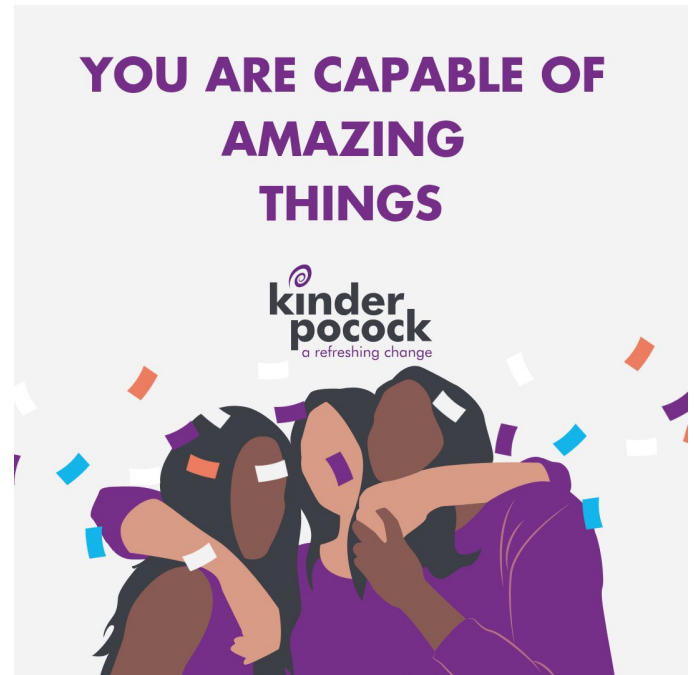
About Kinder Pocock

Multi-Award winning Kinder Pocock is a modern and user-friendly firm of digital accountants based in Herefordshire.

The team is eager to embrace latest technologies to improve the way they work and support small business. In addition to the firm's many awards, partner, Sharon Pocock was also named Xero UK's Most Valued Professional 2016.

We spoke with Sharon about the difference Clarity has made to her firm.

kinderpocock.co.uk



Highlights

- ✓ Clarity helps us have better conversations with clients, which in turn helps us to understand them and their goals so much better
- ✓ Every business owner should have a Clarity Action Plan. We do at Kinder Pocock - to which Sam, at Clarity, holds me accountable
- ✓ The setup and implementation is easier than any software we have used before
- ✓ Clients are blown away and are much more engaged! It is very visual, easy for them to understand and they can quickly see the value of working with us
- ✓ The framework, platform and systems give the team the confidence to have more impactful meetings with clients too. This stops partners/directors being the bottle neck and ultimately means you can support more clients
- ✓ Price sensitive clients have gone from not wanting to pay anything for advisory, to wanting monthly meetings, financial plans, cashflow forecasts and so much more
- ✓ Our team are happier, which means are clients are too!
- ✓ 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 love supporting my clients and my team, and sharing information with them. I set up Kinder Pocock to offer small businesses the service they need and want to help them be successful; whatever that might mean to the business owner!

Outside of work I love Zumba! It is such good fun, and a great stress reliever. I also love reading (can't go to sleep without reading first) and going for walks with my boys.

We at Kinder Pocock have so much potential to support our clients in getting back on track and growing their businesses. I'm feeling very positive about the team that I'm growing, who all love to engage with each other and our clients.



We've made some changes over the last year which are going to enable us to scale more sustainably and to provide the services that we want to deliver. Clarity is providing a large part of the structure, framework and education to help us do that. **It has also helped us have better conversations with clients, which in turn has helped us to understand them and their goals so much better.** No pun intended, but it really has helped them to have clarity and focus on what they want to achieve too.

Where does Clarity fit into you app stack?

It's an essential piece of our app stack that integrates beautifully with Xero. And it's very powerful to see Portfolio View to review and monitor clients - being able to see the health and performance of our clients in one screen allows us to be even more proactive in the advice we are giving.

I genuinely believe that **everyone should have a Clarity Action Plan as we do at Kinder Pocock**, which Sam from Clarity holds me accountable for! So we've built it into our onboarding process as part of our 3 month review meeting. Clients are loving it! Who doesn't like talking about their businesses? As soon as you start to ask questions, you can visibly see them energise and light up.

You never know where the conversations might end up and sometimes the business owners even surprise themselves with the objectives they set.

The perfect flow is creating action plans with clients to achieve their goals, then creating a financial plan and cashflow to make it a reality, and hold them accountable!

How has Clarity helped your firm?

The set up and implementation is easier than any software we've used before. At first we were cautious, as we weren't sure we'd have the time to devote to it. But going through the Quick Start Guide and working with the member success team made us focus on the quick wins to build momentum. Once we started to achieve results, it became obvious where it would fit into our workflow.



OneClearPath has taken it to another level and has started to help us systemise this within our practice. It still feels like we're only scratching the surface with it as we can see just how much potential there is with existing and prospective clients.

The support from the whole Clarity team is great, it's so great to have them on our team!

From a team perspective, Clarity has given us an opportunity to work even closer together. It's also given one of my client managers, Jo, so much confidence to be a part of the journey, and she is showing this in all areas of her work. She's taking herself out of her comfort zone more and more.

I always thought that I would have to deliver the majority, if not all, of the advisory services in the firm. Using Clarity as the framework, it has helped the team to have impactful meetings across the board. It's just 7 key numbers for the business owner and the team to get their heads around!

What has been the impact on your firm and clients since using Clarity?

Clarity is so much more than just an app. They have provided so many systems and guides and have produced everything that you could need really.

It's perfect for providing accessible and affordable advisory services, and there is also an easy way to move clients up to more involved packages when they're ready. In less than a month we increased monthly recurring revenue by £2,500 and generated one off fees of £5,000, and we had only just scratched the surface. That was with less than 10 clients.

We want to keep going and going. This is the service I want to be delivering to all of my clients!

Clients are blown away and are much more engaged! Clarity's power is how visual it is, and that it's only looking at the 7 key numbers, not blinding clients with all the numbers. They can see the impact of small improvements straight away, so **they see the value of working with us, rather than us just quoting additional fees to them.**



For one client it's taken us years to get them to pay for advisory. We always have the conversation, then they won't pay. Our most recent meeting was a game changer, and they went away with higher improvements than we initially agreed! The client kept asking all the way through the meeting when he would get the action plan and get started on his actions! It's great that they want to be held accountable, as we love to have as much client interaction as we can.

Clarity is easy for small business owners to understand, is a great conversation starter, and a great way to up-sell our advisory services which, let's face it, is the best part of our role!

The team are happier that they get even more client contact. **Our clients are happier** and more excited than ever about their businesses. Given we are coming to the end of such a difficult period for everyone, this is the perfect time to get our clients thinking forward and putting together actions to make 2021/22 their best yet.

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

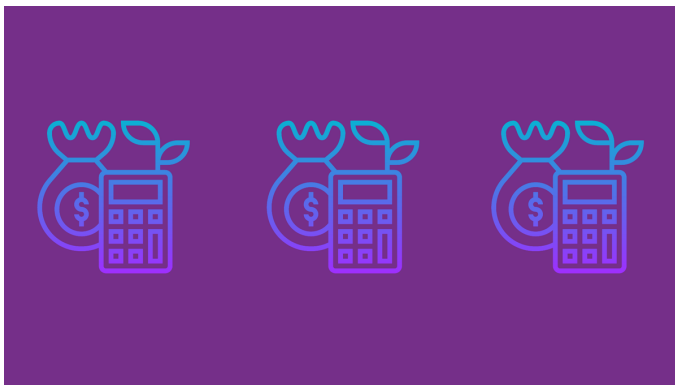
Sign up, be proactive and take action! If you're not sure, attend one of the Getting Clear Workshops, so that you get the most out of Clarity from the very start. Then get involved with the member events.

It's super easy to use, and the framework means that the rest of the team can get involved. This stops the accounting partners/directors from being the bottle neck and ultimately means you can support more clients with the tailored help they need.

We love that Clarity was **created by accountants for accountants**. The founders have been there and done it and you can tell it's been built with that experience and insight in mind. It's also great that most of the Clarity team are chartered accountants themselves and have been there and done it. There's nothing I can't ask them that they can't help with. The support is fantastic!

Visually, Clarity is very neat and **simplifies the story behind our clients' numbers**.

For a price sensitive client we recently created a financial plan at the touch of a button and sense-checked the numbers, which included increasing the accountancy fee to what



it really should be for the help they need. This blew our client's mind! They saw our increased fees, but still a huge profit improvement. **They went from not wanting to pay anything, to wanting monthly calls to go through comparing their financial plan to their actual figures.**

The Clarity team are constantly developing the product, so we are able to get more and more value out of it.

You've regularly attended the Clarity member-exclusive events. How useful have they been for you and your firm?

They're mega useful because Clarity encourages everyone to get involved. It's not the kind of webinar you can have on in the background. But this encourages me to share more, and to get more out of the events, and take action.

Hearing how other progressive accounting firms are dealing with their challenges and being successful is so insightful. **Every session we come away with something new to think about and focus on.**

Jo and I also attended the Getting Clear Workshop. This basically kicked us into action, as it gave us that much more of an understanding of how the software works and what's possible. It also gave us challenges, and ways of having the right conversations with clients.

And It's given us both loads more confidence to do this! The change I've seen in Jo over the last couple of months has been incredible to see. Part of that is down to getting involved with Clarity and being encouraged to hold impactful meetings with clients.

I have also been a part of the Clarity mastermind group, led by Steven and Aynsley. It has been **brilliant to be part of a group with like-minded, ambitious and digitally focused accounting business owners**. The group accountability, collaboration and insight from Steven and Aynsley has allowed us to build a pathway to advisory within Kinder Pocock. It has provided a space to bounce around ideas before we take action and has been a perfect sounding board.

Now I put 90 minutes aside every day to work on my business - which has been transformational!



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