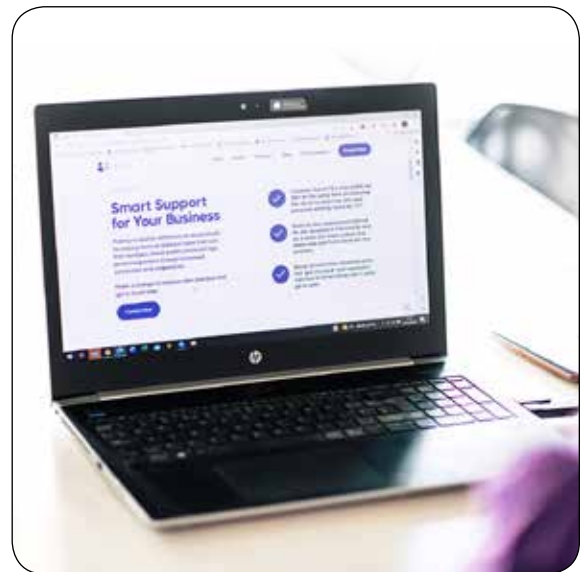


BALANCING YOUR PRACTICE

This guide will help you discover the 3Cs formula to overcoming the overwhelm



CCC



SMARTSUPPORT
for business

Your 3C formula to a balanced practice



SMARTSUPPORT
for business

Balance is for more than just your books

Your name

Your practice name

Number of people in your team



CLIENTS

1. Have you clearly defined who your ideal client is? Yes ☐ No ☐

2. What is it?

3. What proportion of your current client base matches this?

Less than 10% ☐ 10-30% ☐ 31-49% ☐ 50-75% ☐ over 75% ☐

4. Do you offer fixed fees? Yes ☐ No ☐

5. What proportion of your client base pays by direct debit?

Less than 10% ☐ 10-30% ☐ 31-49% ☐ 50-75% ☐ over 75% ☐

6. What proportion to these services represent in your client base?

	< 10%	10-30%	31-49%	50-75%	over 75%
Accounts	☐	☐	☐	☐	☐
Tax Returns	☐	☐	☐	☐	☐
Advisory	☐	☐	☐	☐	☐

7. What is your average fee?

8. Do you have a client feedback process? Yes ☐ No ☐

11. What was your latest client happiness score?

12. Do you have a process to ask for referrals? Yes ☐ No ☐

13. How good are the referrals?

Great they are all my ideas clients ☐

A bit of a mixed bag ☐

Being honest they're not that great ☐



CONTROL

14. How many hours do you work each week?

35-40 ☐ 40-50 ☐ 50+ ☐

15. Do you work outside office hours?

Yes regularly ☐ Sometimes ☐ Never ☐

16. When do you do those extra hours?

Evenings ☐ Weekends ☐ Both ☐

17. Do you have a system for "switching off" when you finish work for the day?

Yes ☐ No ☐

18. How much holiday time did you take last year?

Less than 10 days ☐ 10-20 days ☐ 21-30 days ☐ Over 30 days ☐

19. When was the last time you took a whole week off?

20. When you go on holiday are you able to leave work completely behind?

Yes ☐

Mostly, except if the team need me ☐

Not at all I still get calls and check emails ☐

21. Who handles the pricing enquiries in your practice?

Just me ☐

Me and someone else ☐

We have no system so anyone can ☐

22. What percentage of client meetings are you involved with?

All of them ☐

Most of them ☐

Some of them ☐

23. Over a year what percentage of your time do you spend on

	< 10%	10-30%	31-49%	50-75%	over 75%
Compliance work	☐	☐	☐	☐	☐
Client meetings	☐	☐	☐	☐	☐
Team development	☐	☐	☐	☐	☐
Practice development	☐	☐	☐	☐	☐

CHALLENGES

27. What are the worries that keep you awake at night?

28. What are you tolerating in your practice?

29. What are you not making decisions about?

30. If you had a magic wand in your practice, what is the ONE thing you would change?

