



**PF**

**Partnership  
Success**

*Agreement*





We're excited to be working with you! Our primary goal is to see that you get the marketing help you need so that your accounting firm truly becomes profitable. (Hence, our name.)

In line with that, this partnership success agreement sets out what we commit to do on your behalf, the way we work, and what we need from you so that we can deliver that work to you.

## *Are we a fit?*

You're not quite locked in yet, so if you discover or decide that we are not a fit for you, or you're just not ready, now's the time to make the call. We've reviewed everything you've sent us thus far, and from our perspective we are absolutely in, and we're excited to serve you.

The purpose of the partnership success agreement is to make sure we're **both** in.



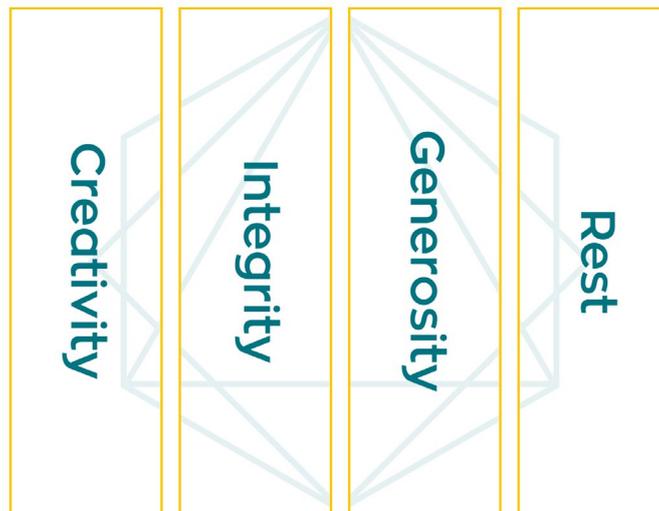


# Our pillars

There are four Profitable Firm pillars that hold up all the work we do. It's our commitment to strive for excellence in all of these areas - and we anticipate that you will hold to these pillars in your own life and business.

## THE PROFITABLE FIRM

### Pillars



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## Creativity

Naturally core to all our marketing activities, we commit to keeping an eye out for the most creative, innovative, best ideas for your marketing - and this includes investing in the creative talents of our team. We encourage our entire team to do what makes them come alive - because that will flow into the work we do for you.

We'll also encourage you to be alert to the most creative marketing ideas available to you and your firm, and to be open to trying new things (even if you're a little nervous about it).





## Integrity

Our integrity will never come into question with you, our team, or anyone who knows us. We will not ethically cut corners, we will be truthful, and we will not lie to you.

Equally, we anticipate that you and your team will also have these qualities as you are working with us.

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## Generosity

Giving, and giving things away, is core to our marketing. Before you become a client we give a lot away for free because we want to give you time to see how we work and think. And we (individually and as a team) make a particular point of giving to charitable organisations we are involved in. Once you become a client, our generosity means that from time to time we may just surprise you with a little extra something – particularly if you’ve had a hard day or week or month – and that we do our best to stretch ourselves as needed to go beyond if you need it.

The firms and people who work with us tend to be generous, too, because like attracts like.

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## Rest

Our team take great pride in our work, and we’ll work the late hours needed to get it done on deadline. But we will never deliver good results for you if we’re stressed, exhausted, or worn out: and so times of rest are encouraged and supported for our whole team.

We encourage you to do this, too. There’s no need to apologise to us for being on holiday, taking the morning off, or just sitting around doing nothing, if that will help you to be rejuvenated and refreshed.





## The inner courtyard

Within the (virtual) walls of the PF, we also have standards that we as a team have agreed to. Every member of the team makes a conscious effort every day to check ourselves on these, and to keep each other accountable to them:

- **No defensiveness** - If we're wrong, we're wrong. There's no push back or hurt feelings, and we don't take things personally.
- **No blame** - We work as a team, so if mistakes are made, we don't waste time trying to figure out whose fault it is. We'll address what went wrong so it doesn't happen again, but otherwise we simply fix it, and move on.
- **Humility** - True humility does not mean thinking poorly of ourselves, but having the same level of appreciation in our own talents and skills as in someone else's. We commit to knowing what we're good at, and doing it well. We also accept and appreciate that there are some things we don't do as well as others do. (See our section on 'other marketing consultants')
- **Patience** - We recognise that when it comes to marketing, many accountants are treading new ground. You may still be learning about content marketing, or graphic design, or video. You may even be a little nervous or have been treated badly in the past by other marketers. To the best of our ability, we will have the utmost patience with requests, changes, ideas, feedback, worries, fears, or anything else - with you and within our own team.
- **Accountability** - We're also here to hold your feet to the fire and push you to make decisions that are sometimes outside of your comfort zone. We'll be patient, but we'll also challenge you, too, with ideas and milestones and suggestions.

“[The humble man is ] in the end, ...so free from any bias in his own favour that he can rejoice in his own talents as frankly and gratefully as in his neighbor's talents—or in a sunrise, an elephant, or a waterfall.”

~ C. S. Lewis





# How we work at PF

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We're 100% remote, and it's important that you not only understand, but love that.

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We are firm believers in the power of remote and virtual working to help and reach more people - in our case, accountants.

It is extremely important for both our clients and prospects that you not only understand that we are a remote company, but you love that aspect of our business.

First, we've built the business in this way because it means we can reach more accountants.

Secondly, we want to show you by example what you as the accountant can do by working virtually with your clients. It's not going to be a fit for every client, but it's a powerful means of improving your efficiency and reach - and ultimately your profitability.

Our Managing Director, Karen Reyburn, works from a home office in Scotland. The team work either from home or a local coffee shop (or wherever they want really, as long as they have a strong internet connection).

Our core team are located in the UK and operate on the UK time zone - but we have part time and outsourced team members who are embedded into the fabric of the PF team, so often work is being done on alternate time zones as well.

If working with a local provider, and having in-person meetings, is critical to you - or you can't imagine doing business any other way - then we might not be the best fit for you. If you've never worked in this way before but you're open to trying it, that's great! As long as your attitude is one of excitement and anticipation (not dread or fear), then we'll help you through it. If you have any concerns, please ask, and we'll share you stories of how it's worked for other firms.

As an example, we built an entire Customer Journey website (our most involved and most custom website option) for a firm in California. As much as we would love to fly back and forth to their offices, we opted for the virtual way (the PF way) and it has worked like a charm.





## THE CLIENT EXPERIENCE

Accountancy firm Whittaker & Company came to us for a complete new website rebuild, including a logo refresh and an Infusionsoft integration. Here's what their marketing manager has to say about choosing to work with someone remotely:

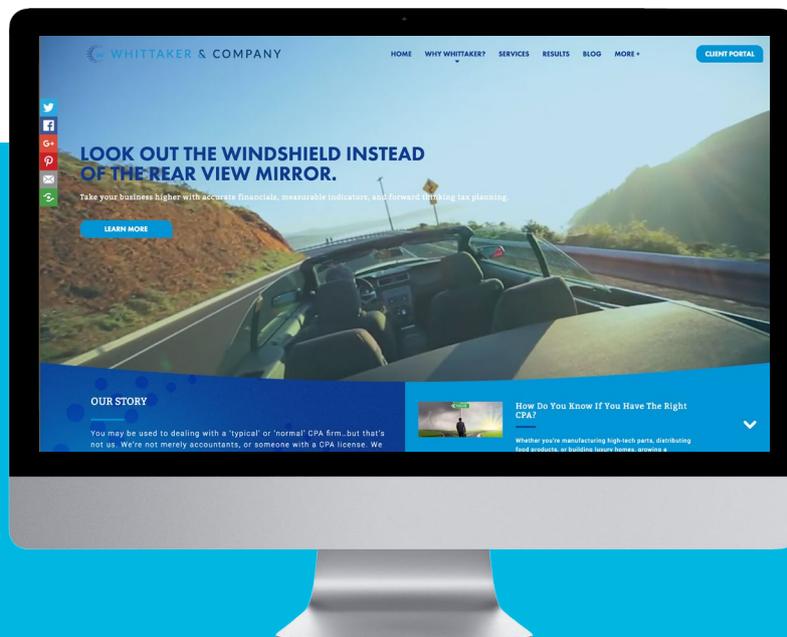
*"When my managing partner suggested we contact The Profitable Firm to discuss creating an entirely new website for us, I admit I was hesitant to think about working with someone in the UK due to the time difference. I was concerned that I wouldn't be able to actually speak to them, and that everything would be done via email and the response time would lag an entire day.*

*I was wrong because that was not the case. When we have Zoom calls, it's really no different than having a phone call with someone who was local. While I agree that it would have been ideal for our team to have met face-to-face with her during our Customer Journey meeting so they could get a sense of our culture and personalities, it never negatively affected the outcome of our project.*

*I have learned what times the team are usually online answering emails, so I have adapted as well by logging in and replying first thing in the morning for me, so we can go back and forth for a few hours until it is time for them to call it quits for the day. I have found them to be highly organised and to have a systematic approach to dealing with clients.*

*I am honestly more happy with the Profitable Firm's services than I would have been with a local provider."*

- Jill Zozula, Marketing Manager, *Whittaker & Company*





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We always encourage you to start at a low level, and move to a higher when you're ready.

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Marketing is exciting. And sometimes you want to do ALL THE THINGS straight away! Build the website! Get the new logo! Write blogs! Record video and get those edited every week!

In our experience, for most accountants addressing marketing, there are a number of foundational marketing elements you need to address before you get into a consistent pattern of delivering amazing content on a regular basis.

For this reason, we will always encourage you to start low, or start small, and build on it. Here's why:

**1. We are committed to helping you, not selling you marketing stuff.**

Many, many accountants the world over have been treated badly by other marketers, who have sold them something they didn't need, didn't want, and ultimately got nothing from in the end.

We don't promise that we're perfect in this regard - it is possible for you to choose something and realise later that it's not the best fit for you - but we do promise to be alert to what you most need, and never to pressure you into more if you're not ready.

This is why we built our [Accelerator programme](#) the way we did. We knew that recorded videos would be easier and quite

frankly more profitable for us. But knowing accountants as we do, this kind of education and training requires interaction and commitment - so we offer this programme in online group sessions and ask you to show up. There are fewer accountants on the programme because of this, but those accountants are getting amazing results. That's what matters to us.

**2. You need to be comfortable and confident that we are the best fit for your firm when it comes to marketing.**

We put a lot of effort into our own content marketing so that you have a high level of trust in us before you even begin working with PF. Still, we're conscious that thinking about something and committing to it is one thing - actually experiencing it is another.

So we encourage you to start where you need to be and want to be, explore how the relationship is working, and as your confidence builds, you'll add more and more. That's much better than biting off more than you can chew, and finding yourself frustrated with us, or yourself, or the whole world.

**3 You can always bolt on more later.**

Rushing into marketing can lead to frustration and discouragement. We have many bolt ons that you can add at any time - website management and hosting, more marketing credits, [social media packages](#), a logo refresh - whatever you need.





#### 4. When you know, you know.

All that being said - if you know you want to do a major project, and you're committed and ready, don't hesitate. We're in, if you're in.

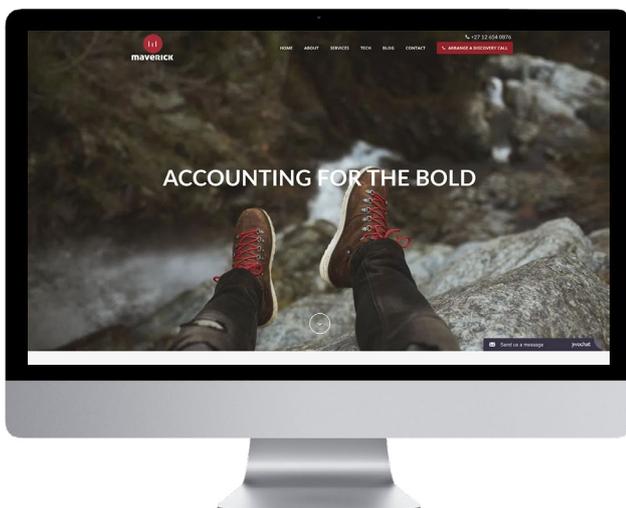
It's about building a relationship with us, and being confident that we'll deliver what we discussed and what's most important to you. When that happens, there is nothing stopping you but going for it. And going for a big project rather than the slow burn can save you energy, time, and money in the long run. It's your call.

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## THE CLIENT EXPERIENCE

Our clients Maverick Accounting in South Africa decided to go the whole way - not merely invest a little here and there, but to do a full branding identity, new website build, and content strategy & plan.

Here are Shane's thoughts on why they went this route instead of taking it piece by piece: "I'll give the cons and the pros:



#### **Cons:**

- Bigger cash flow hit upfront
- The usual greater uncertainty regarding such a decision the moment you are spending more money - will it be worth it?

#### **Pros:**

- I think going all-in will ultimately give a better, more consistent overall result (the look and feel of the brand, customer experience, website etc).
- Having everything in place at once will have a much greater impact on our marketing engine than building it piece by piece. So the return on investment will be better because payback will start sooner and in greater volume.
- An all at once approach helps keep the bigger picture in focus
- In terms of our personalities, a slow-burn approach would mean we start losing focus/impetus, and following through to the end would be a problem. A more intense implementation just makes more sense.

#### **Other factors:**

- We had ventured down this road about 18 months ago, tried to do it "cheaper", with the slow-burn approach.
- The other agency didn't really get what we wanted.
- We also - this time around - had a better idea of what we wanted, and how we wanted to roll-out."





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We need input and feedback from you - and we'll need a little more of this at the beginning of our relationship.

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It sounds like the dream to task us with blog writing and infographics and video review and presentation creating, and then go on your merry way and do literally nothing while magic happens.

That's not quite how it works, and here's why.

Our rallying cry on your behalf is custom content.

We write and prepare content and design items for you that reflect your experience, ideas, thoughts, and advice in a way that is like no other accountant.

To do this, we need your input and feedback.

We have systems that will help us get as much from you as possible with the least amount of time on your part - but it's still a little time we'll need.

The good news is, although we need a lot more of this at the beginning, over time we'll get to know you so well that our calls will be shorter - and for some of our clients, they don't need a call at all. Marketing does happen magically with very little effort on their part. And that's the result of an initial investment of time, and most of all the partnership between us.

[Watch this video of Karen's thoughts on how much time is required from you.](#)

“Knowing the Niche session was coming up I was getting frustrated trying to work out exactly what it is for the business. And you know what after the homework last night and after pivoting on my niche I think I've found it: retail tech-savvy businesses who need management information and procedures. It feels fantastic! Thanks so much for yesterday and have a great weekend!”

~ Lauren Harvey, Full Stop Accounts (Content Marketer member)





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This is a two-way partnership, not a one-way command centre.

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The highest performing firms that we work with are in regular communication with us. They send us ideas, thoughts, documents to review, suggestions, and ask our opinion and advice on a regular basis.

The reason this makes your marketing work so well is that it truly reflects you. Your expertise - which is what your prospects are buying.

If this isn't for you, and all you need is an outsourcer who will churn out some fairly generic stuff or won't give you much by way of expert advice or feedback, then we suggest you look at sites like People per Hour and Fiverr. They'll be cheaper and faster, and that might be what you need at first.

Remember the age-old rule: of the following three items, you can only ever have two:





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We believe in education and inspiration of accountants.

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It's our modus operandi. We have a great deal of expertise in delivering successful marketing exclusively for accountants - and we love to share that expertise.

First, because it shows you by example how content marketing is done. You educate, you train, you inspire, you show. It's not about telling people what

to do: it's about inspiring them so that they are personally involved in their success.

That's why we built our [Accelerator](#) and [Social Marketer](#) group programmes. For those who aren't ready for a big investment, you can get all the learnings of our years and years of experience without having to spend the earth.

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We work exclusively and only with accountants.

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We know about cash flow forecasts, balance sheets, net profit margins, and inheritance tax. (Okay, not as much as you, but we understand the principles.) We get cloud accounting. Xero. R&D tax credits. HMRC making tax digital. VAT MOSS. Auto enrolment. (AE is the most boring topic ever, by the way, but we've managed to make it interesting for a few firms when writing content on it.)

We've had quite a number of firms come to work with us who told us straight up that they could have had their website built by someone

more local, at a lower cost, and even with a company they already had a relationship with. But they chose us because, as they put it, "We don't have to explain things to you about accounting."

This not only saves a lot of time when we're talking strategy, lead to sale processes, and your firm's customer journey - but it also means that we can share stories of other accountants who are doing it well, so you know what works in the industry.

*"After 130 years, Saint are finally doing marketing well."*

~ Jane Maclachlan, Saint & Co Chartered Accountants (Outsourced marketing package)





# The money bit

## How and when we invoice (up front and on milestones)

We've worked long and hard at building a model that delivers results for you.

When it comes to our payment terms, we've discovered that the traditional model of doing the work, then sending an invoice, then waiting 30 days, then chasing for payment, and perhaps never getting paid, doesn't work for anybody.

Here's why.

That old-school model encourages a lack of feedback, and a very slow marketing process. The longer you delay feedback - on your website, your design work, or anything we're doing for you - the longer you can delay payment. This may help your cash flow, but it doesn't help your marketing

In addition, because everything we do for you is custom, we invest a lot of time up front. We create strategic briefs, we hold team meetings and discuss your project, there's brainstorming and drafts and ideas and setup and a lot of excitement!

By the time we get to delivery of your draft work, all we need is some feedback and a few tweaks, and we're good to go! Your marketing can commence!

And THAT is the most important thing. We want your marketing to be actually delivered. Not simply sit there in draft for months. Or years.

That's how old-school accountants do things: and that's not you!

So, to help you get results faster, here's how we invoice, and how we take payment:

1. We get a Gocardless or Stripe authorisation from you so the payment details are ready to go
2. We take the first payment based on the type of work noted below
3. We take further payments when we deliver based on milestones

This ensures commitment, and it means that the project moves forward faster - because you know payment will be taken based on our delivery rather than on your feedback.

As an example, for our £20k website projects, we actually take 80% of that in the first 3 months, when the bulk of the work is completed. It makes websites launch faster and marketing get done better, which is what everyone wants in the end!





## Milestones

For one-off projects or agreed monthly retainers, we'll let you know how much you will be paying, and unless the project or scope changes, that fee will stay the same. (In fact, you may from time to time find us going a little above and beyond, because we like to do that for our clients.)

Here's an example of how milestones work. If your project is a custom one that isn't listed below, we'll communicate that with you when we kick off.

### **SMALL one - off projects - graphic design, logo refresh, content work, etc:**

- 50% on commencement
- 50% on delivery of first draft

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### **LARGE one - off projects - branding identity, customised website, etc:**

- 60% on commencement
- 30% on structure/layout/wireframes/raw design
- 10% on delivery of first draft

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### **MONTHLY retainers - outsourced marketing, social media, etc:**

- First month's payment immediately
- Ongoing payments invoiced & payment taken on 1st of the month

## Extra fees for things

As a creative agency, we are very conscious that the largest percentage of our costs come from our team's time. This means we are careful to ensure that our quote covers everything we agreed; but if there are additional elements added, we will likely be sending you another quote for those.

We only want to do work you have approved, and are happy with. If you get a quote that makes you feel pressured for any reason, just tell us! We'll pull back and give you some breathing space.

"I have had about ten new leads in the two months since joining the programme, totaling £35k. The work that has been accepted to date is £14k. The way I see it is that this is directly attributable to the Content Marketer, which has made me more conscious about marketing and that therefore attracts new leads. So thank you!"

~ Scott Johnson,  
(Content Marketer member)





# What we need from you

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## If things go wonky...

So, we have a startling fact for you: we will, at times, get things wrong.

*\*GASP!\**

We know - it's heartbreaking. You might even wonder what you're getting into. (However, in our experience, this will also be true in 100% of the other companies you work with.)

Here's what we commit to doing if something is wrong:

- Thank you for your feedback. We're always glad to know how we can improve! Thanks for letting us know!
- Explain why it went wrong
- Tell you how we plan to fix it (or how we did fix it, if it's quick)
- Give you a deadline or timeline, if possible, of when it will be fixed

- Apologise, genuinely
- Communicate with you throughout
- Fix the problem
- Talk with the team about why it went wrong and what we can do to prevent this sort of thing in future
- Be alert to signs of it happening again (just in case)
- Keep listening

Naturally, this presumes that you will:

1. Let us know if something is wrong
2. Stay in communication with us throughout
3. Have a partnership attitude - being willing to understand, and gracious (we appreciate it!)
4. Accept that you might get things wrong, too, from time to time (but of course this is very rare...)





## The high performing firms (will this be you?)

This is from an email I sent one of our clients, when a website project took a little longer than they originally hoped, and they were looking for confirmation of adjusted milestones. We sorted it out, adjusted the milestones, and everyone agreed on the way forward. Our client wrote a thank you for our explaining the process, how it works, and what we do when milestones have to be shifted. Here's what I replied:

*“Not a worry - and this is how the best PF partnerships work. The more we explore the most successful and high performing accountancy firms that we work with, the more we see honesty and consistent feedback, combined with a mutual respect. When any of those are missing, the relationship doesn't work, and the results aren't great. But when they're all there, it works like a charm...even when it doesn't!”*

*I'm really grateful for your always sharing with us what you're thinking, because then we don't have to guess! And plus it helps us to keep striving to do better.*

*And yes... if I've learned anything about website projects, almost every single one is unrealistic, by everyone! But we strive on.”*

# “Not perfect, but done.”

~ Karen Reyburn





# The systems we use to deliver your work

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To help us deliver your marketing work to you, we use a variety of systems that include:

## Basecamp

We set up a Basecamp project to manage tasks, to-do's, and conversations surrounding your marketing work. Any messages or notifications will come through to your email inbox, and once you've accepted the initial invite, you can simply reply directly to messages from your email (rather than having to log into yet another system).

## Facebook Marketing Community

We have a PF marketing community on Facebook which allows you to connect with other PF clients - like you, accountants who want to use marketing in new and different ways. The more often you engage with us and other accountants on new ideas, victories, and questions, the better your marketing will be.

## Zoom

Naturally because we're virtual, most of our calls will be held on Zoom. If it's a strategy meeting, we'll record the call so the team can listen to it in future and get a sense of your style, tone of voice, focus, and purpose.

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## Security & logins

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We will likely need to ask you for logins to sites such as Wordpress, social media, CRM systems, and other similar marketing systems. Rest assured we will always keep these safe and will only share them with members of the PF team who need them to take action on your marketing work.





# What if we need to have the "It's not you, it's me" talk?

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Sometimes, for personal or financial or whatever other reasons, you need a breather. Some space. "It's not you, it's me."

That's absolutely fine. Presuming you're not in the midst of a 12 month commitment (our outsourced packages and programmes), you're on a month to month and can make changes with 30 days' written notice. (Email is fine.)

The key is that you are getting valuable, helpful marketing support in the areas that are most helpful for you. If for any reason that is not happening, tell us straight away so we can fix it. If it is, but you still need to step back, talk to us so we can help you through it.

We will never pressure you to stay if it's not a fit, and we'll welcome you back with open arms if you come back to us after any space of time.





Does all of this sound good?  
You're ready to go?

Excellent! We are excited to start working with you!



[Terms and Conditions](#)





**PF**

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

