



## Tips and tools to find your marginal gains

Kevin Lord, Digital Enablement Manager





**Kevin Lord**

*Digital Enablement Manager*

**Background:** 10+ years experience of supporting SME businesses and accountants in change management

**Favourite Film:** A Beautiful Mind

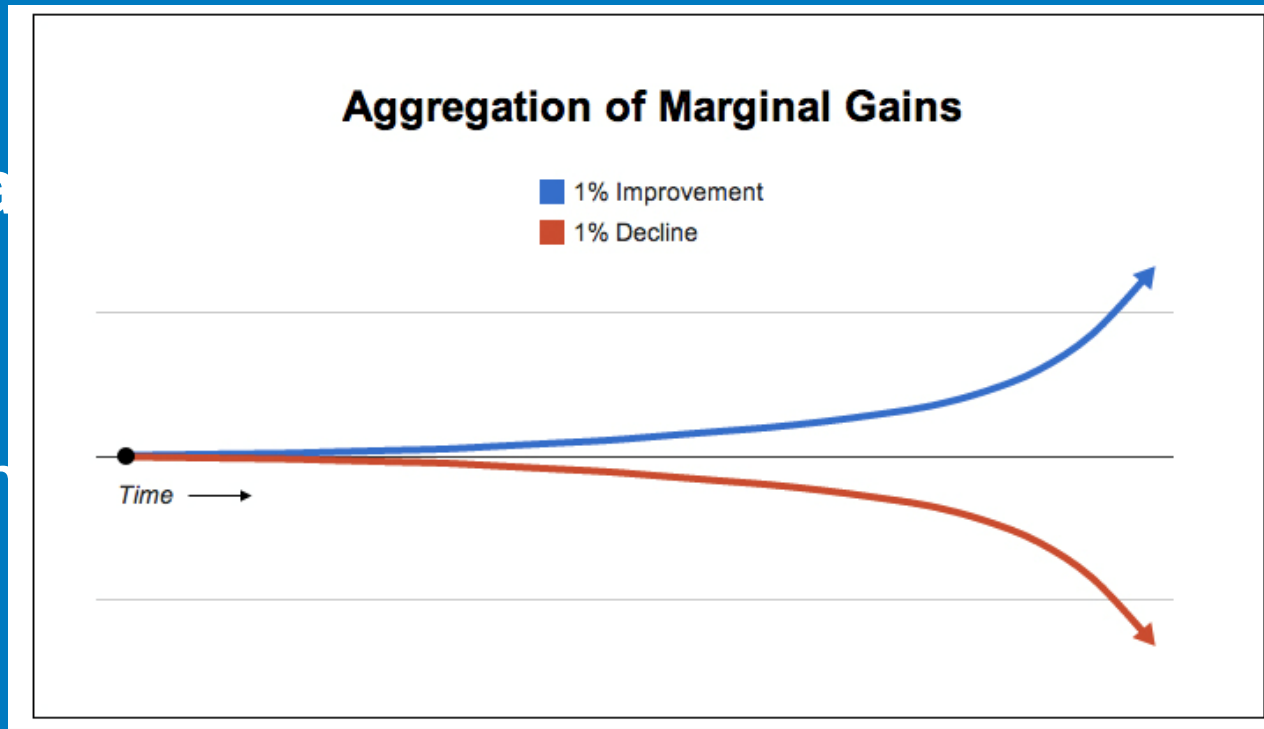
**Favourite Song:** Whole of the Moon, The Waterboys

**Best thing about me:** Oxtail Ragu with fresh pasta



- Award-winning cloud accounting and bookkeeping software for SME Businesses
- Founded in 2007
- Focus on simplicity and compliance
- UK headquartered where the software is developed and supported
- First crowdfunded firm to successfully launch IPO
- RBSG purchase in 2018
- 200+ staff and 90,000+ users

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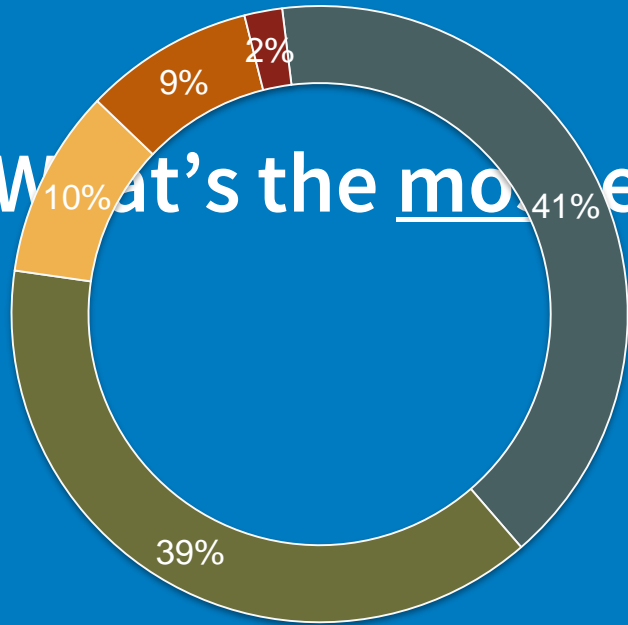


A still from a video featuring actor Nick Kroll. He is sitting at a desk in an office, looking directly at the camera with a confused and questioning expression. He has a mustache and is wearing a dark blue polo shirt with a white grid pattern. His hands are clasped on the desk. In the background, there is a desk lamp, a framed picture of food, and two large deer antlers mounted on the wall.

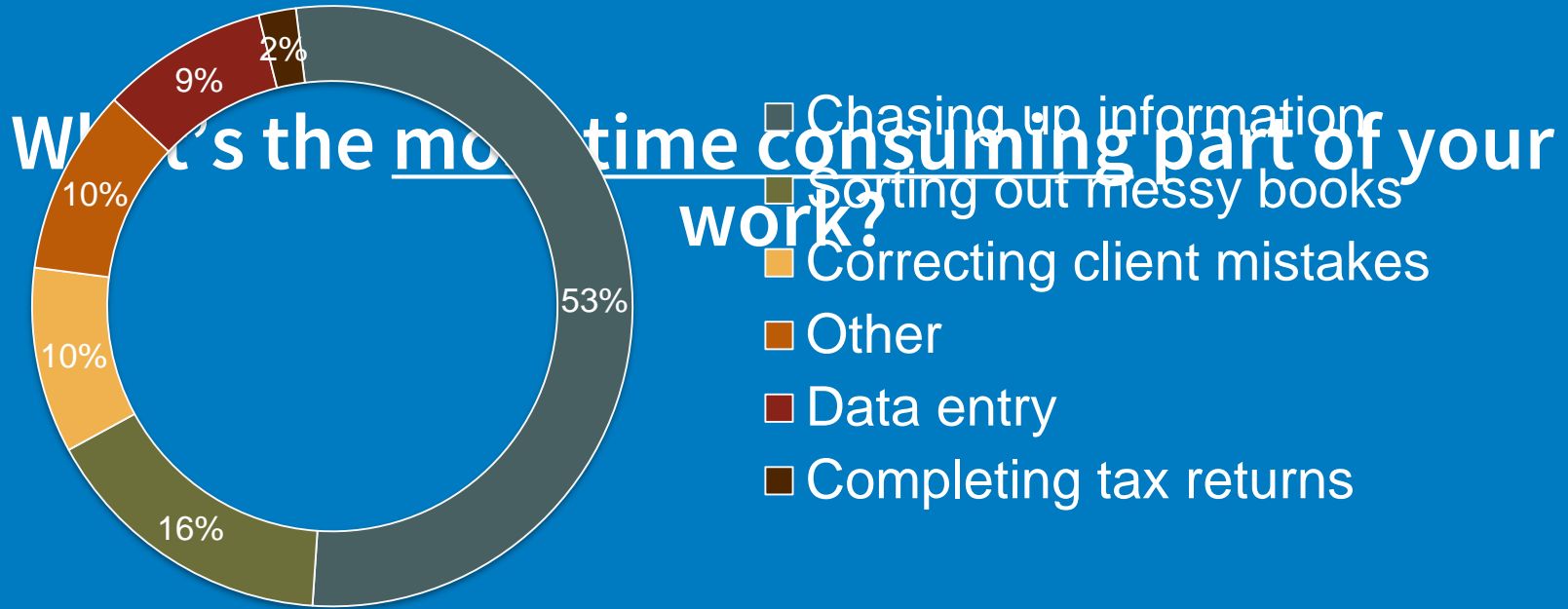
**WHAT'S YOUR  
POINT?**



# What's the most enjoyable part of your work?



- Helping clients grow their business
- Solving problems
- Being an expert in my field
- Other
- Being well paid





# Tips and gains



Internal



Preparation

Start Line

Finish

# Preparation



Mindset &  
commitment



Mobile  
devices



AV  
equipment

# Tips and tools to win marginal gains



Internal



Preparation

Start Line

Finish

# Start Line

System

How you do  
things  
1st

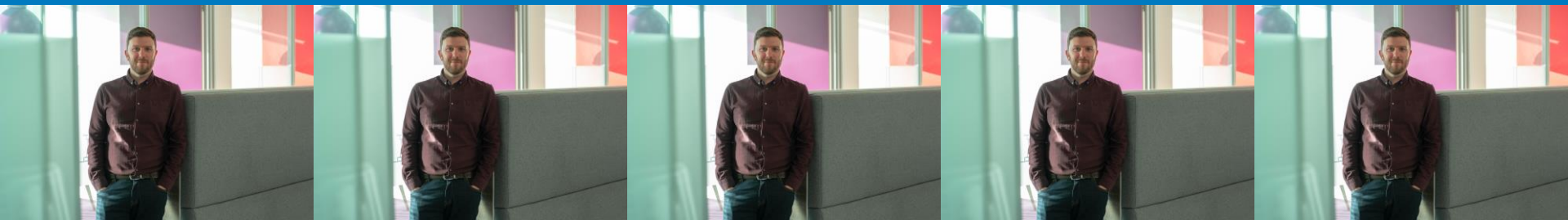
Software

Tools to help  
you do it  
2nd





# Think about what you repeat!!!



# Tips and tools to win marginal gains



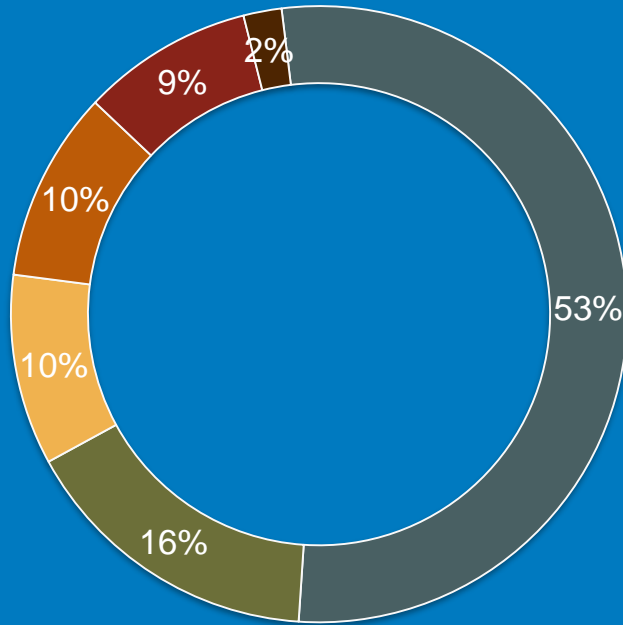
Preparation

Start Line

Finish

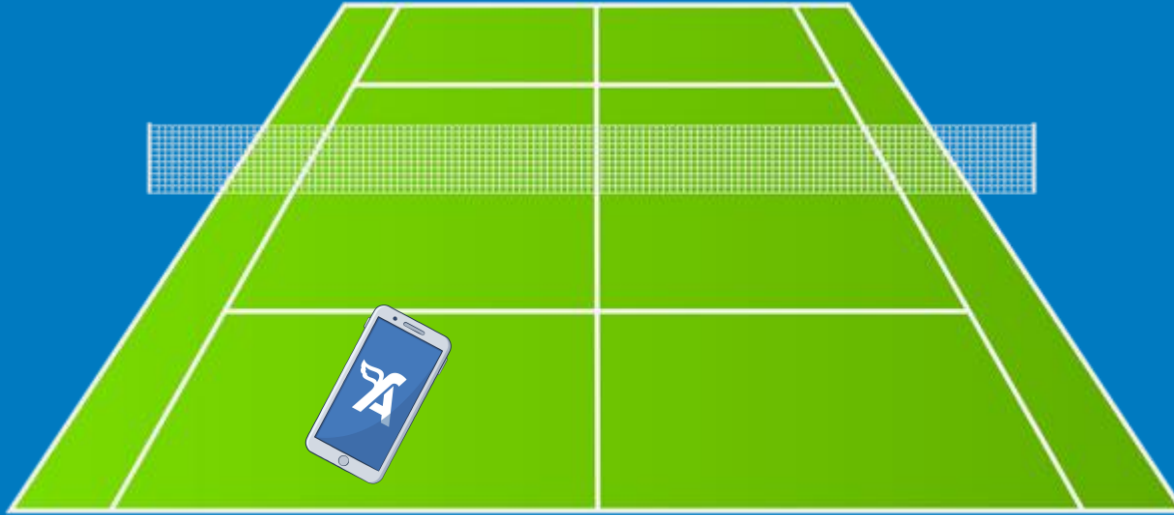


# What's the most time consuming part of your work?



- Chasing up information
- Sorting out messy books
- Correcting client mistakes
- Other
- Data entry
- Completing tax returns

## Example: Telephone Tennis



How many times a day?  
How many clients?

## Solution: Appointment App



calendly

timetrade®

appointy®  
Grow Your Business Exponentially



calendly

\*\*\*Urgent Call - I can save you money!!!!

icb@bookkeepers.org.uk

\*\*\*Urgent Call - I can save you money!!!!

Hi Sam,

I really need to speak with you about the sales figures from July 19-Oct 19.

Please book a time using the available times below and be prepared with your 2019 sales figures.

I think I can save you £££££

MON  
Oct 28

30  
Call to dis

09:00am

09:30am

10:00am

60 Need another time? [See full list of times](#)

Sans Serif

Send



Kevin Lord

**30 minute Call**

30 min

Web conferencing details pro  
upon confirmation.

Call to discuss end of VAT quarter



**Teresa Green and Kevin Lord**

Wednesday, 30 October · 1:30 – 2:00pm

[Join Zoom Meeting](#)

<https://zoom.us/j/820305961>

2 guests  
2 yes



Kevin Lord  
Organiser



tg@forestry.com

Event Name: 30 minute Call

Call to discuss end of VAT quarter

Location: <https://zoom.us/j/820305961>

You can join this meeting from your computer, tablet,  
or smartphone.

You can also dial in using your phone.

GB: [+44 20 3966 3809](tel:+442039663809), [+44 131 460 1196](tel:+441314601196), [+44 20 3051 2874](tel:+442030512874), [+44 20 3481 5237](tel:+442034815237)

Meeting ID: 820-305-961

Going?

Yes No Maybe

Monday, October 28

9:00am

9:30am

10:00am

12:30pm

1:00pm

1:30pm

## Other Examples:



GOCARDLESS



AutoEntry

freeagent

	Time Saved per client (mins)	Number of clients	Total	}	33.3 hours
Telephone Calls	10	50	500 mins		
Answering Questions	8	50	400 mins		
Getting Paid	2	50	100mins		
Getting Data	20	50	1000mins		

# Tips and tools to win marginal gains



Preparation

Start Line

Finish



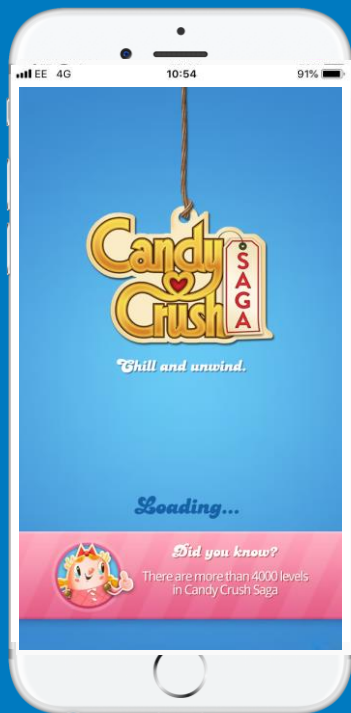
“My clients won’t do  
that!”

Really???

Have you asked them?

My journey to you

# Mobile phone usage



- Alarm
- Bus timetable
- Bus tickets
- Podcast
- Boarding pass
- Social media
- Email
- WhatsApp
- Monzo
- Citymapper
- Uber
- Apple Pay
- FreeAgent
- Slack
- Amazon
- Candy Crush



## Mobile Phone Usage

- Instant
- Accurate
- Convenience
- Safe
- Efficient

# How to ask your clients



Google Forms



# What to ask your clients

- What services do you use?
- What services do you need?
- What is your main source of income?
- How many employees do you have?
- What are your future ambitions?
- Would they recommend you?
- What are your social media tags?
- How satisfied are they with your service?
- What technology they use?
- Who do you bank with? (free licenses)
- Common problems
- Can you grade them?
- What are your concerns?
- How would you like me to communicate with you?





# Keeping Engagement - EMAIL



“Emails are now opened more on  
mobile than desktop”

Hi Sarah,

I hope you are well.

~~And as I have wasted 3 lines of space asking if you feel ok, you will have probably deleted this email there will have no idea what it is if I was looking to speak to you about.~~

~~On the off chance that you read this, can you call me on 0131 539 2975....where a game of telephone tennis will begin.~~

~~Looking Forward to it~~

~~Kevin~~

# Keeping Engagement - EMAIL

- Relevance

Why are you emailing your client?

- Reward

What's in it for them?

- Request

What are the next steps?

PS - Adding value through content

Hi Sarah,

As discussed at our meeting yesterday, with MTD for VAT going live in April, you now have to keep your records digitally. I have set you up with a FreeAgent account and you should have received an email to set your password.

Relevance

FreeAgent is perfect for you as it is simple to use, has excellent credit control functionality and a mobile phone app to help you capture expenses when you are out at client meetings.

Reward

Can I ask that you log in and set up your online bank feed ASAP as shown yesterday?

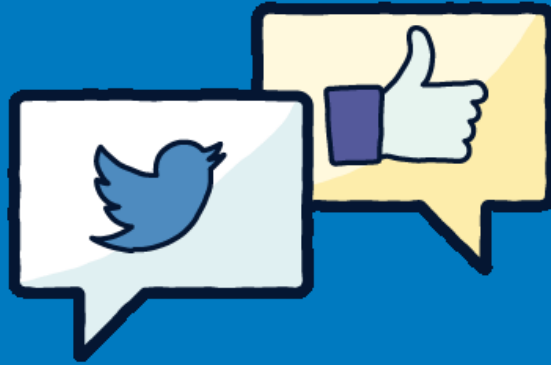
Request

Thanks

Kevin  
PS - I have a similar client that had issues with their website design and they found the following training course helpful. I think this could be the answer to your problems!

Added Value

# Keeping Engagement



# Did you know



45 million active social media users in the UK

People spend an average of 1 hr 54 mins daily on social media

People turn to social media for information and reviews

90% of social media users use it to communicate with businesses

78% of people said that posts by the businesses they follow impact their decisions



# Keeping Engagement



in

Search

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Me

Work

Try Premium Free for 1 Month



## Kevin Lord

Leading the strategy to deliver a world class digital education journey, helping small businesses reach their potential

Edinburgh, United Kingdom · 500+ connections · [Contact info](#)

Add profile section




More...

FreeAgent

10+ Years of Building Successful relationships t...

About

I work exclusively with accountancy practices, helping them attract and retain clients through developing their cloud based services. My passion is to make a true impact with all accountancy firms and by working together we will create a clear strategy for your cloud proposition, ensure you know your client base, bring efficiency ... see more



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78

Who viewed your profile

0

Article views


72

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
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**Jack Cowhig** · 3rd   
Production Assistant at EYEBOLLS



**Nichola Scott** · 2nd  
Relationship Manager at Bank of Scotland Commercial



**Reza Shirazi** · 2nd

FreeAgent

Get a standard header and a professional looking photograph



Edit intro



FreeAgent

220 Characters - use them. What is it you do??? DO NOT PUT JOB TITLE



First Name \*

Kevin

Last Name \*

Lord

[Add former name](#)

Headline \*

Leading the strategy to deliver a world class digital education journey, helping small businesses reach their potential

Current Position

Practice Digital Enablement Manager at FreeAgent

[Add new position](#)

☒ Show education in my intro

Education

10+ Years of Building Successful relationships to grow SMEs

[Add new education](#)

Who cares what school you went to? What experience do you have??



Country/Region \*

United Kingdom


ZIP code

eh3 3lt



Locations within this area


Edinburgh, United Kingdom

FreeAgent



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I work exclusively with accountancy practices, helping them attract and retain clients through developing their cloud based services. My passion is to make a true impact with all accountancy firms and by working together we will create a clear strategy for your cloud proposition, ensure you know your client base, bring efficiency ... see more



**Your Dashboard**  All Star


*Private to you*


<b>78</b> Who viewed your profile	<b>0</b> Article views	<b>72</b> Search appearances
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**Edit public profile & URL**

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**Promoted**


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
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See why LearnUpon is the foundation great companies are building upon.



**Invitation from LinkedIn**  
Place ads on LinkedIn. Acquire new customers for your business. Try it now.


**People Also Viewed**


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Relationship Manager at Bank of Scotland Commercial

**Reza Shirazi** · 2nd

## About



I work exclusively with accountancy practices, helping them attract and retain clients through developing their cloud based services. My passion is to make a true impact with all accountancy firms and by working together we will create a clear strategy for your cloud proposition, ensure you know your client base, bring efficiencies to your processes, build staff capability and maximise advisory conversations with your clients. My view is that technology is driving the opportunity but people will determine its success. That's why most of our work involves helping firms drive, motivate and inspire staff to embrace change.

There is a huge amount written about how the accountancy profession is, and will be changing. This is driven by a mixture of things but technology is at the centre, with the accountant moving from a number cruncher to a trusted advisor. I urge you to take the benefits of our insights to and challenge yourself to make a successful change

### BUILDING RELATIONSHIPS

I am passionate about solving your problems, streamlining your process and building a future proof plan for your business. However, my main satisfaction is building relationships up to a point where I see the true changes in your work/life balance that embracing technology will give.





**Kevin Lord**

Leading the strategy to deliver a world class digital education journey, hel...

6d • Edited



Calling all business/practice owners - what is the main digital tool you use that has proven to give you the best efficiencies and why?

Is it cloud accounting? Could it be a booking system? Or a remote meeting platform? What is the main tool you just couldn't survive without???

[#efficiencies](#) [#cloudaccounting](#) [#platform](#) [#tool](#)

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18 • 26 Comments



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Comment



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3,630 views of your post in the feed



# Keeping Engagement

- 5 mins: check feeds daily and respond promptly
- 5 mins: follow clients, their businesses and industry leaders
- 10 mins: join conversations
- 10 mins: share practice news and insights
- 20 mins: share content from third parties



# Tips and tools to win marginal gains



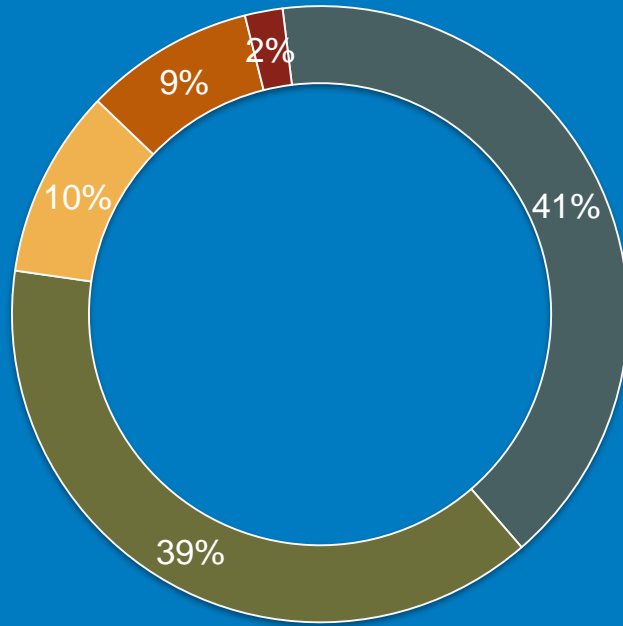
Preparation

Start Line

Finish



# What's the most enjoyable part of your work?



- Helping clients grow their business
- Solving problems
- Being an expert in my field
- Other
- Being well paid

# Live your best life!!!!



**Thank you!**

**Questions?**