The Institute of Certified Bookkeepers

Content Snare

THE INSTITUTE OF CERTIFIED BOOKKEEPERS

ICB SOFTWARE ACCREDITATION

ICB Accredited Software

"This tool has the ability to save time, streamline processes and remove some of the frustration bookkeepers often face chasing for documents or information."

Stephanie Marshall FICB PM.Dip

PREPARED BY

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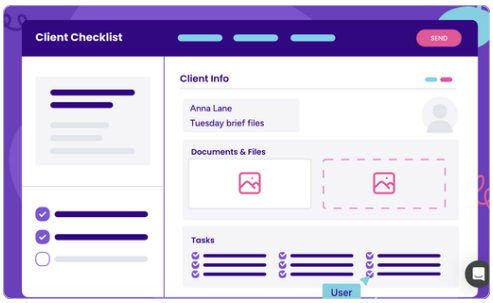
October 2026

ABOUT THE PLATFORM

About Content Snare

Overview

Content Snare helps bookkeeping and accounting practices collect information and documents from clients in one place. Practices can create their own requests, set automatic reminders and work with clients to gather the information they need. This can help make processes more consistent and reduce the time spent chasing clients for missing information.



CONTENT SNARE CLIENT CHECKLIST

Reviewers liked the flexibility of the platform and its potential to save time, particularly for practices dealing with large volumes of client information or recurring processes such as payroll.

The main consideration is setup. Content Snare takes some time to configure, particularly when creating templates and workflows, but once these are in place, reviewers found that it can deliver significant efficiency savings.

Key benefits

- Highly customisable document and information requests.
- Automated client chasing reduces repetitive administration.
- Consistent processes can be implemented across multiple clients and team members.
- Collaborative forms make it easier to collect information progressively from clients.
- Central dashboard provides visibility over outstanding and completed requests.
- E-signing functionality supports client confirmation and approval.
- Reusable templates can generate significant time savings once properly configured.
- Client-facing experience was considered straightforward and accessible.

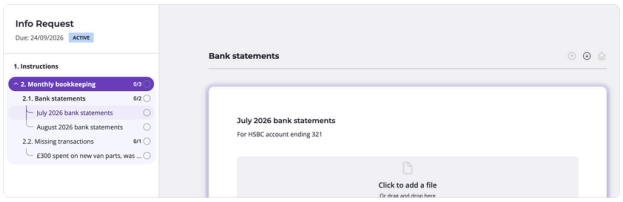
> *"I was impressed by the scope of this product. It has a huge amount of potential to tackle getting documents from clients and collating them"*
>
> Laura Macarthy MICB

FINDINGS

Product Review

Client information collection

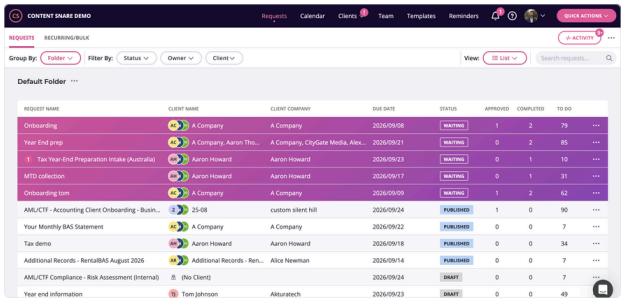
- Provides a centralised process for requesting and collating client information and documentation.
- Clients and bookkeepers can work collaboratively on forms, allowing clients to complete information progressively rather than needing everything available at once.
- Particularly useful for client onboarding, payroll and other workflows requiring significant amounts of client information.
- E-signing functionality enables clients to verify information submitted through the platform.



CLIENT-FACING INFORMATION REQUEST

Automation & efficiency

- Automated chasing and reminders can reduce the amount of time practices spend manually following up with clients.
- Standardised templates allow practices to implement consistent information-gathering processes across their client base.
- The dashboard provides visibility over live requests, outstanding information and progress, which can be particularly valuable for practice owners and managers overseeing multiple clients or team members.
- Documents can be directed to shared storage locations, supporting a wider practice technology stack.



REQUESTS DASHBOARD

Customisation & flexibility

- Document and information requests can be extensively customised to match individual practice processes.
- Practices can create detailed requests that specify exactly what clients need to provide, helping reduce incomplete or incorrectly formatted submissions.
- Bespoke requests can be saved as reusable templates, creating consistency across multiple clients.

"The fact that forms can be worked on collaboratively with the client is especially good for onboarding new clients where they may have some of the answers but not all of them."

FINDINGS, CONTINUED

Product Review

Support

- Customer support received consistently strong feedback from reviewers.
- The knowledge base includes useful articles and video guidance.
- Reviewers highlighted the responsiveness of the Content Snare team and recommended making use of support when configuring the platform.

Ideal clients

- Bookkeeping and accounting practices with significant client information and document collection requirements.
- Growing and larger practices that need visibility over requests across multiple clients and team members.
- Practices looking to standardise client onboarding and information-gathering processes.
- Practices handling recurring workflows such as payroll where information must regularly be collected from clients.

Areas for improvement

- Initial setup experience received mixed feedback. While two reviewers found the software straightforward, one reviewer found creating bespoke templates difficult and unintuitive.
- The platform requires an upfront investment of time to understand the different field types, templates and workflow options.
- More UK bookkeeping-specific templates would significantly improve the out-of-the-box experience for ICB practices.
- Some terminology and default request layouts could be clearer.
- Pricing displayed in US dollars may make budgeting less straightforward for UK practices.

"Lean on support. They have a great support team and by asking the question, you'll be able to use the product more efficiently to maximise the benefit."

Product Review

Future feature requests

- A broader library of UK-specific bookkeeping and accounting request templates.
- A more comprehensive guided onboarding process for new users.
- Example requests and reminder schedules that walk users through the main functionality when first setting up the platform.
- Continued refinement of terminology and default request structures to make the initial experience more intuitive.

Conclusion

Overall, reviewers were positive about Content Snare's ability to address one of the most persistent challenges faced by bookkeeping practices: collecting complete and accurate information from clients without continual manual chasing.

Its greatest strength is its flexibility. Practices can create highly detailed and bespoke information requests, automate follow-ups and establish repeatable processes across their client base. For practices handling significant volumes of client information, this has the potential to deliver meaningful time and efficiency savings.

The main consideration is implementation. Content Snare is not necessarily an immediate "off-the- shelf" solution for every practice, and the value of the platform depends on investing time in configuring templates and understanding its functionality. A stronger library of UK bookkeeping templates and enhanced guided onboarding would make the product more accessible to the wider ICB membership.

For growing and larger practices with substantial information-gathering requirements, however, Content Snare offers a powerful solution for improving consistency, reducing administrative chasing and providing greater oversight of client workflows.

"This is ideal for bookkeepers who have a lot of info collecting requirements from clients, especially useful for payroll."

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