

# HOW TO ATTRACT YOUR **IDEAL CLIENTS**

Why most accountancy firms do not have a lead problem. They have a trust, positioning and founder-dependency problem.

A practical guide for accountancy firm founders, managing partners, directors and growth leaders who are tired of generic marketing, patchy pipelines and growth that still depends too heavily on one person.



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# MOST ACCOUNTANCY FIRMS DO NOT HAVE A LEAD PROBLEM.

They have a **clarity problem**. A **proof problem**. A **consistency problem**. And, in many cases, a **founder problem**.

- ▶ They look too similar.
- ▶ They sound too similar.
- ▶ They rely too heavily on referrals.
- ▶ Their website says very little.
- ▶ Their proof is thin.
- ▶ Their follow-up is patchy.
- ▶ Their founder still carries too much of the commercial load.

**THEN THEY SAY THE MARKET IS HARD.**  
**THAT IS NOT A MARKET PROBLEM.**  
**THAT IS A GROWTH SYSTEM PROBLEM.**

The firms that attract ideal clients most consistently are not always the loudest. They are the clearest. They know who they are for, what they are known for, how to make trust visible, and how to move a prospect from interest to confidence without the whole process depending on one person's personality.

This paper sets out the framework we use to fix that:

## FOUNDATION | MOMENTUM | SCALE

- ▶ **Foundation** makes you credible
- ▶ **Momentum** makes you visible often enough to matter
- ▶ **Scale** multiplies what is already working

Most firms try to start with scale.

That is where they waste money.

They buy attention before they have built belief. They push traffic towards a weak website, inconsistent messaging and vague proof, then wonder why the enquiries are poor, price-sensitive or hard to close.

Get the order right and growth becomes more predictable.

Get it wrong and you stay trapped in the same loop: good work, weak positioning, stop-start visibility, founder-led selling, and a pipeline that never feels fully under control.

**The problem is rarely a lack of leads.**  
**It is a lack of reasons to believe.**

# THE CORE ARGUMENT IN FOUR LINES

- ▶ **Ideal clients do not choose the firm that shouts the loudest.**
- ▶ **They choose the firm that feels clearest, safest and most relevant.**
- ▶ **That confidence is built through positioning, proof, visibility and process.**
- ▶ **Once that foundation exists, growth becomes far easier to repeat and scale.**

## HERE'S THE BIT MOST FIRMS ALREADY KNOW

**Most accountancy firms are not losing work because they are bad.**

They are losing work because they are **too hard to choose confidently.**

- ▶ **Same promises.**
- ▶ **Same service list.**
- ▶ **Same “trusted adviser” language.**
- ▶ **Same generic About page.**
- ▶ **Same weak proof.**
- ▶ **Same founder who still has to step in and close.**

That is not differentiation.

That is camouflage.

And ideal clients do not buy generic.

They buy the firm that feels like it understands their world, has solved this before, and can be trusted with something commercially important.

If you do not create that feeling quickly, you do not get the meeting.

Or you get the wrong meeting.

Or you get the meeting and lose on confidence, not competence.

That is why so many firms think they need more leads, when what they actually need is a better reason to be chosen.

**Being good is not enough.**

**The market has to be able to see it.**

# WHAT THE MARKET IS ALREADY TELLING FIRMS

**The profession is not moving away from trust. It is moving towards a higher standard of trust.**

Research highlighted by ICAEW shows that **95% of SME bosses say their accountant has strategic value**, but only **8%** describe that relationship as **outstanding**. That gap matters. It tells you something uncomfortable: most firms are seen as useful, but far fewer are seen as exceptional.

ICAEW's 2024 mid-tier research found that **86% of firms already offer business advisory services**, yet those services account for only **8% of fee** income. The same report found that **45%** of firms see business advisory as a top-three growth opportunity, while **45%** expect clients to want more value-add and **31%** expect demand for more tailored support over the next three years.

The capability often exists. The commercial packaging often does not.

Karbon's accounting-firm ROI guidance says common **LTV:CAC ratios sit around 4:1 to 5:1**. In plain English: if you are winning clients at all, but you do not know what it costs to attract them or what they are worth over time, you are not managing growth properly. You are winging it.

That is not just an operations point. It affects growth too. The more time your team loses to friction, the less time they spend following up, progressing opportunities and creating a better buyer experience.

So the signal from the market is clear:

**Clients want more value.**

**Firms say they offer more value.**

**Very few make that value obvious enough, commercial enough, or visible enough to win consistently.**

## BENCHMARK SNAPSHOT: FIVE NUMBERS WORTH KNOWING

**95%** SME bosses who say their accountant has strategic value. Being technically sound is now the minimum, not the differentiator.

**8%** SME bosses who describe the relationship as outstanding. The gap between "valuable" and "outstanding" is where better positioning, proof and client experience win.

**86% / 8%**

Firms offering business advisory versus fee income actually generated from it. Many firms have the capability. Far fewer have built the commercial engine around it.

**45%** Mid-tier firms that see business advisory as a top-three growth opportunity. The opportunity is obvious. The execution is where firms separate themselves.

**4:1 TO 5:1**

A common accounting-firm LTV:CAC benchmark, according to Karbon. If you do not know your acquisition economics, you do not know whether your growth is healthy.

**You cannot out-market weak positioning.**

**You cannot out-scale weak trust.**

# WHY FIRMS STALL

What firms call a lead problem is usually one of five things.

1

## WEAK POSITIONING

They are trying to sound relevant to everyone, so they end up resonating with no one.

2

## THIN PROOF

They say they are proactive, commercial and trusted. They do not show it properly.

3

## FOUNDER DEPENDENCY

The commercial confidence lives in one person. When that person is busy, growth slows.

4

## INCONSISTENT VISIBILITY

They disappear for weeks, post in bursts, follow up late, and expect the market to remember them.

5

## PREMATURE SCALING

They amplify before the message, proof and conversion journey are right. More reach just means more people bouncing off the same weak experience.

That is why we use:

**FOUNDATION | MOMENTUM | SCALE**

Not because it sounds neat.

Because it reflects the order the market actually responds to.

# 1 FOUNDATION

## Make trust visible

Foundation is what a prospect sees before they ever speak to you.

- ▶ **Your website.**
- ▶ **Your LinkedIn presence.**
- ▶ **Your messaging.**
- ▶ **Your proof.**
- ▶ **Your team.**
- ▶ **Your offer clarity.**
- ▶ **Your booking flow.**
- ▶ **Your digital credibility.**

This is where most firms are weaker than they think.

A proper foundation answers six questions fast:

- ▶ **Who do you help?**
- ▶ **What are you best known for?**
- ▶ **What problems do you solve?**
- ▶ **Why should I trust you?**
- ▶ **Why are you different?**
- ▶ **What do I do next?**

If those answers are vague, trust slows down.

And trust that slows down usually dies.

## WHAT FOUNDATION ACTUALLY INCLUDES

### Positioning

Not “we work with ambitious businesses”.

That means nothing.

Who specifically? With what problems? Why you?

### Messaging

Talk like the client thinks.

Not like an internal service menu.

### A proper website

Not a brochure. A conversion asset.

Relevant pages. Sharp copy. Human photography.

Clear proof. Clear next step.

### Proof at volume

Case studies. Client quotes. Video. Outcomes. Stories.

Before-and-after evidence.

Not one polite testimonial hidden on page six.

### Offer clarity

What is the route in? Assessment? Audit? Call?

Package? Advisory review?

If people do not know how to start, they delay.

### Profile alignment

If the founder’s LinkedIn says one thing and the website says another, you create doubt.

Foundation is not glamorous.

It is just expensive to ignore.

**Before a prospect buys your service, they buy your credibility.**

# 2 MOMENTUM

## Earn enough repetition to matter

One good post is not a strategy.

One nice case study is not a growth engine.

One founder with strong energy is not a system.

Momentum is controlled repetition.

It is showing up often enough, with enough relevance and enough proof, that the right people begin to associate your firm with a specific kind of value.

That means:

- ▶ **consistent content**
- ▶ **repeated proof**
- ▶ **regular follow-up**
- ▶ **visible expertise**
- ▶ **useful lead capture**
- ▶ **simple nurture**
- ▶ **a clear commercial rhythm**

This is where many firms lose their nerve.

They post for two weeks.

Nothing dramatic happens.

They stop.

Then they say LinkedIn does not work.

That is like going to the gym four times and concluding muscle is a scam.

Momentum matters because trust is cumulative.

By the time a good-fit prospect enquires, they should not feel like they are discovering you from scratch. They should feel like they have been warming to you for a while.

That is when the sales call changes.

Less suspicion.

Less explaining.

Less price tension.

More belief.

**Visibility is not vanity when it builds trust.**

**It is part of the sales process.**

# 3 SCALE

## Amplify what already works

Scale is where firms usually get seduced too early.

Ads. Outreach. Events. Partnerships. SEO. More content. More volume.

None of that is wrong.

It is just dangerous when it comes before the basics are right.

If your message is vague, ads will buy you expensive confusion.

If your proof is weak, outreach will drive people towards doubt.

If your founder is still the only person who can close properly, more demand will expose the bottleneck, not solve it.

Scale is not a fix.

It is an amplifier.

Use it once:

- ▶ **the positioning is clear**
- ▶ **the proof is strong**
- ▶ **the conversion path makes sense**
- ▶ **the team can qualify and progress opportunities properly**
- ▶ **the market is already showing signs of response**

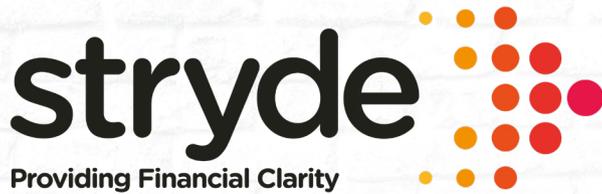
Then scale becomes smart.

Before that, it is often just panic with budget behind it.

**Scale does not rescue weak foundations.**

**It exposes them.**

## WHAT THIS LOOKS LIKE IN REAL LIFE:



**Stryde is a strong example because the problem was not a lack of talent, demand or ambition.**

The bottleneck was familiar: too much of the sales engine depended on the founder. That created capacity limits, concentration risk and inconsistent qualification as the business moved towards higher-value work with longer sales cycles.

The work focused on making sales more repeatable, more team-led and more measurable. That included a shared sales conversation framework, live practice, a clearer event and follow-up structure, stronger qualification, and gap-spotting around proof assets such as case studies and social proof.

The impact was immediate.

Stryde reported **£24,000 ARR** closed shortly after the initial strategy and training work. That win then led to a referral worth a further **£43,000 ARR**, with those two relationships alone representing **£335,000 in client lifetime value**. Later support around an event turned a **10-lead target into 17 leads**, generating a further £57,000 ARR, plus additional active pipeline.

Across the case study headline figures, the work is presented as **£124,000 in ARR won, £620,000 in client lifetime value**, plus **£165,896 in active ARR pipeline worth £829,480 in client lifetime value**.

That is what happens when you stop treating sales as a personality trait and start treating it as a system.

**Founder-led selling can build a firm.**

**It can also become the ceiling on it.**

## THE SEQUENCING ARGUMENT

This is where firms waste the most time.

They do this:

- refresh the logo**
- post a few times**
- sponsor something**
- run some ads**
- tell the team to ask for referrals**
- complain that leads are poor**

That is not a growth strategy.

That is random activity dressed up as effort.

The right order is:

### 1 FIX THE FOUNDATION

Positioning, messaging, proof, website, offer clarity, profile alignment, conversion path.

### 2 BUILD MOMENTUM

Content, proof distribution, follow-up, nurture, founder visibility, repeated market presence.

### 3 SCALE WHAT THE MARKET IS ALREADY RESPONDING TO

Ads, events, outreach, partnerships, search, campaigns, referral systems.

Skip step one and scale magnifies weakness.

Skip step two and the market never sees you often enough to care.

Do it in the right order and growth starts to feel less lucky.

**The firms that grow best are rarely doing more.**

**They are usually doing the right things in the right order.**

# COMMON OBJECTIONS, ANSWERED

## ***“We already get most of our work through referrals.”***

Good. Keep them. But referrals are not a complete system. They are inconsistent, hard to control, and still rely on what prospects find when they look you up.

## ***“We are not trying to become influencers.”***

Good. Neither are we. This is not about ego. It is about making expertise visible enough to be trusted before the first call.

## ***“We just need more leads.”***

Maybe. But if good-fit prospects are not converting, or poor-fit prospects keep landing, volume is not the first fix.

## ***“Our founder is our best salesperson.”***

That may be true. It is also the beginning of a ceiling.

## ***“This sounds like marketing.”***

It is. But not the fluffy kind. This is commercial infrastructure: trust, conversion, qualification, proof and pipeline discipline.

# WHAT THIS MEANS FOR YOUR FIRM

**If you are an accountancy firm between roughly £500k and £10m turnover, the useful questions are not:**

- ▶ Should we post more?
- ▶ Should we run ads?
- ▶ Should we hire someone to do LinkedIn?

The better questions are:

- ▶ Are we easy to understand?
- ▶ Are we easy to trust?
- ▶ Are we visibly relevant to the clients we want more of?
- ▶ Do we have enough proof?
- ▶ Is our founder still carrying too much of the commercial load?
- ▶ Are we tracking what good growth actually looks like?
- ▶ Are we scaling a working system, or just amplifying confusion?

Firms that answer those questions properly do not just get busier.

- ▶ They get sharper.
- ▶ They get more selective.
- ▶ They convert better.
- ▶ They protect margin better.
- ▶ They stop confusing effort with traction.

# CONCLUSION

The firms that attract the best-fit clients are not the firms that look busiest.

They are the firms that look clearest.

- ▶ They make trust visible.
- ▶ They show proof properly.
- ▶ They sound human.
- ▶ They follow up well.
- ▶ They reduce founder dependency.
- ▶ They give the market a reason to believe before the first conversation.

That is what winning actually is.

- ▶ Not more noise.
- ▶ Not more random activity.
- ▶ Not hoping referrals keep carrying the month.

A proper system for attracting the right clients, building confidence quickly, and turning commercial effort into repeatable growth.

Because most firms do not have a lead problem.

They have a **belief problem**.

And belief is fixable.

**READY TO SEE  
WHERE YOUR  
FIRM IS LEAKING  
IDEAL CLIENTS?**

It will show you where your firm is losing trust, relevance or momentum across positioning, proof, visibility and conversion; most importantly, what to fix first.

**CLICK HERE TO TAKE  
THE IDEAL CLIENT  
WIN ASSESSMENT**

**OR SCAN  
THE QR  
CODE**

