



PF

**Partnership
Success
*Agreement***





We're excited to explore working with you!

PF works with ambitious accountants who serve their clients "with heart". This means you care - and we care too.

Our goal for you is to have an accounting firm which is not only more profitable, but also attracts ONLY the clients you want. This agreement sets out what we commit to do on your behalf, the way things work at PF, and what's expected from you. This way we're both clear about how it will work, and excited to work together!

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. If you're not sure for any reason, tell us honestly and directly. We'd rather know for sure we aren't a fit for you - and why - than press ahead if you have doubts.

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

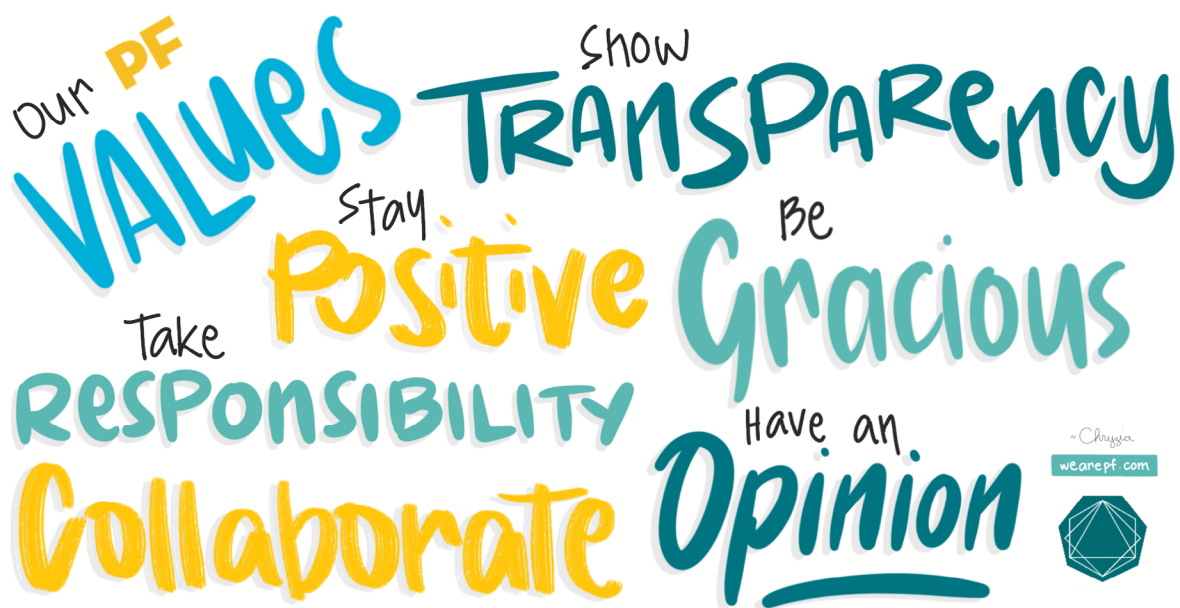
Once you've read through this, if it gets you even more excited about working with us, then let's go!





PF Values

We live and die by these. We hire and fire by these. We expect it from each other - we praise each other when these are done well, and call each other out if these are not being adhered to. We expect it from our clients and strategic partners.



Show transparency:

We share the right things at the right time to build relationship.

Being transparent doesn't mean sharing everything all the time: it means sharing the right things at the right time so you can build relationship. We believe in vulnerability, and being humble enough to say we don't know or we are confused or hurt or frustrated, if need be.

We give the truth, and we expect the truth in return, even if you're not sure why you think or feel that way. Even if you think you might hurt our feelings. Even if you believe we may disagree.





You're entitled to your opinions and feelings, and transparency means we are all operating on the same page - not acting on the basis of stories we are making up in our heads.

We believe in sharing "The story I'm telling myself is", so that we can together get to the truth. And have the best possible relationship because of it.

Have an opinion:

We know what we think, and are able to explain why.

We won't simply agree to be agreeable.

We are experts in content marketing and will have an opinion on whatever you ask us. (If we have no opinion or don't know yet, we will honestly tell you that.)

We commit to not simply having an opinion, but having an informed opinion, with reasons based on experience. We share our opinions and the reasons for them, and we eagerly look forward to a joint discussion about it.

If your opinion is different, we work that out together, and use all the other PF values to arrive at a conclusion.

Stay positive:

We look for the good, and believe there's always a blessing.

We believe there's a blessing in every situation, even hard or difficult ones. We look for the good. We are full of gratitude for the good things in life, and encourage you to do that too.

Our positivity isn't fake: we reserve the right to be sad or discouraged, but we deal with that in our closest circles (family and trusted people in our lives). We don't allow that to seep into our actions and decisions and communications, and in connection with the Transparency value are honest about those kinds of feelings when the situation calls for it.

We commit to encouragement, and to providing a safe place in which team members and clients can see how things will get better.





Take responsibility:

We take ownership, and we strive to be better.

Things go wrong sometimes, and there are reasons for that. We'll be aware of those, but we don't allow them to be an excuse.

We always consciously look for how we can take responsibility for our role in the situation, how we can do better and be better and serve our clients better.

We own up to mistakes and identify specific ways to correct them, and share those transparently. We look forward to any opportunities to help us improve.

As part of taking responsibility, we recognise our need to help fix things so (as far as it depends on us) the problem doesn't come up again.

Be gracious:

We are here to help, and will be patient and generous.

We commit to patience with each other, to being generous and gracious.

We go to the furthest extent we can when help is required. If someone is focusing on the small details, or not seeing the bigger picture, we commit to helping present another perspective (alongside the other PF values).

You won't have to apologise for having an opinion, or being unsure; and neither do we.

If one of us is getting too caught up in details, or taking too long to take action, we gently remind you of that. Graciousness does not come at the cost of boundaries: we will be firm when needed, and make it clear what the boundaries are, so each person can decide how they want to respond.





Collaborate:

We come to solutions together, as a team.

We commit to joining forces rather than going it alone.

The most creative ideas come from all of us working together: and that includes our team and our clients. We commit to working together on both ideas and problems, to taking initiative to help each other. We look for the most generous reason for things we don't understand. We give our perspective (or opinion), and give space so the other person can share their perspective, too. We listen to each other. We give moments of silence. Where appropriate, we decide together. We commit to always seeking to build relationship.

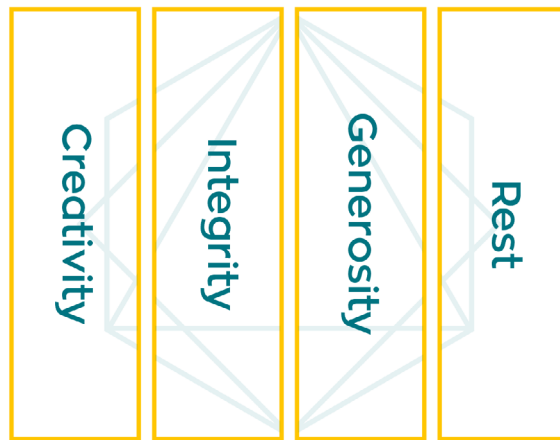
When it comes to suggesting what is best for our clients' businesses, we consider it a matter of integrity to recommend anything that makes business and life better. This applies whether it's a paid for service or a free resource. We only recommend what we would do ourselves, if we were in the same position, knowing what we know about marketing. We give an (informed) opinion on what is best and why, but our clients always have the final decision on what is committed to, and when.





PF Pillars

Our internal values support and work together with the four PF pillars:
Creativity, Integrity, Generosity, Rest.





How we work at PF

We work either from home, remotely, or in co-working spaces all over the world.

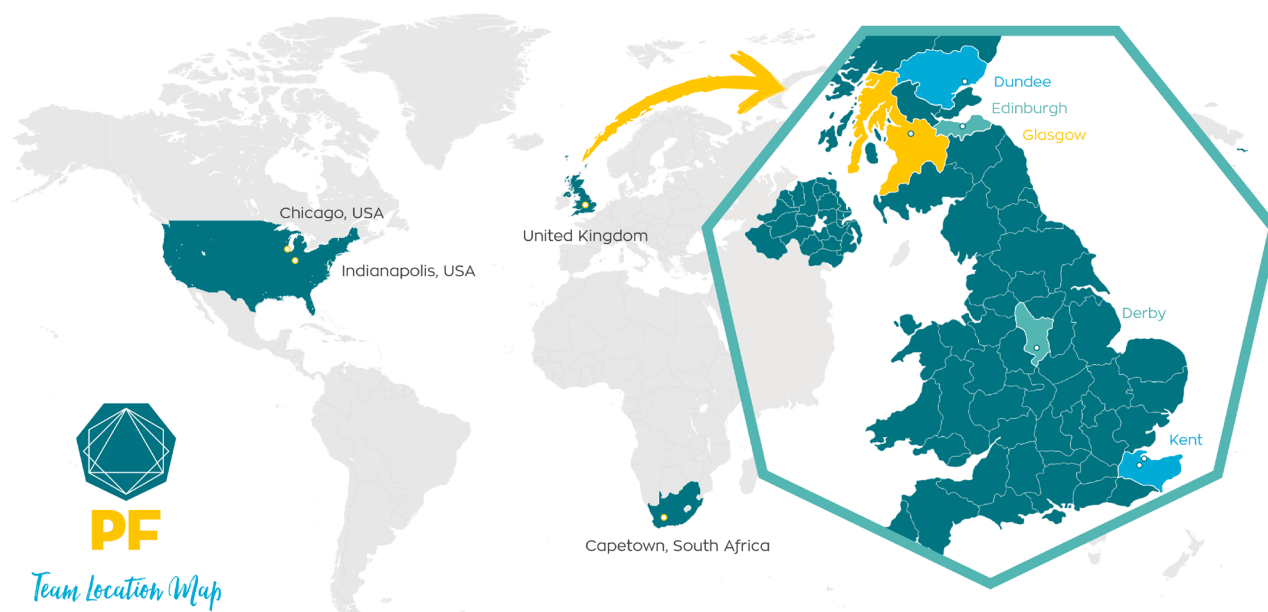
PF has been a remote team since it began. We continue to serve from locations all over the globe so we can serve any accountant who wishes to work with us, and who matches our values.

Our relationship starts virtually, but (when it's possible) we may also meet together in person. We love spending time with you and your team, in your offices, in your city if we can. This allows us to give the absolute best of our time and energy to those who have invested in us. It's a mutual respect of energy.

You also get to see by example what you as the accountant can do by working virtually with your clients. The team work either from home or a co working space

(or wherever they want really, as long as they have a strong internet connection). They may meet with clients at the start of the relationship, if we decide it's the best way to kick things off. (Travel expenses always apply for in person meets.).

We have team members in the UK, South Africa, and the USA, so our work is done on a variety of time zones. If working locally or in person meetings, are critical to you - or you can't imagine doing business any other way - then we aren't 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, then we'll help you through it.





THE CLIENT EXPERIENCE

Read case studies from our recent clients about their client experience [here](#).





Start small, start safe

Marketing is exciting. And you may 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! The PF marketing map - and the results achieved by accountants who have worked with PF following this map - have shown us there are foundational marketing elements you always need to address before doing All The Things.

You're welcome to be as ambitious and intent as you want to be with marketing; but we may encourage you to start small, and build on it. Here's why:

1. We are committed to your success more than to selling you more services.

Accountants the world over (maybe even you) have felt they've been sold something they didn't need, didn't want, and ultimately got nothing from in the end. We don't promise to be 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, to recommend to you what we truly believe will deliver the best result for your firm the fastest, and to let you make the choice.

This is why we built our [Accelerator coaching course](#) the way we did. A recorded training course would be easier and quite frankly more profitable for us. But accountants get the best results when they invest interaction and commitment and accountability - so the course runs via live group sessions with homework.

2. You need to trust your marketing team.

You've already engaged with a lot of our own content marketing, and usually have a certain level of trust already. But thinking about something is one thing - committing to it financially and experiencing it, is another.

Start where you need to be, explore how the relationship is working, and as your confidence builds, you'll add more and more. That's better than biting off more than you can chew, and getting frustrated with us or yourself.

3. You can always bolt on more later.

Rushing into marketing can lead to overwhelm and exhaustion. Good marketing relieves your burdens - it doesn't add to them. There are many bolt ons you can add at any time - website management, more marketing credits, [social media packages](#), SEO, a logo refresh. Talk to your client marketing manager if there's something you think you're missing.

4. When you know, you know.

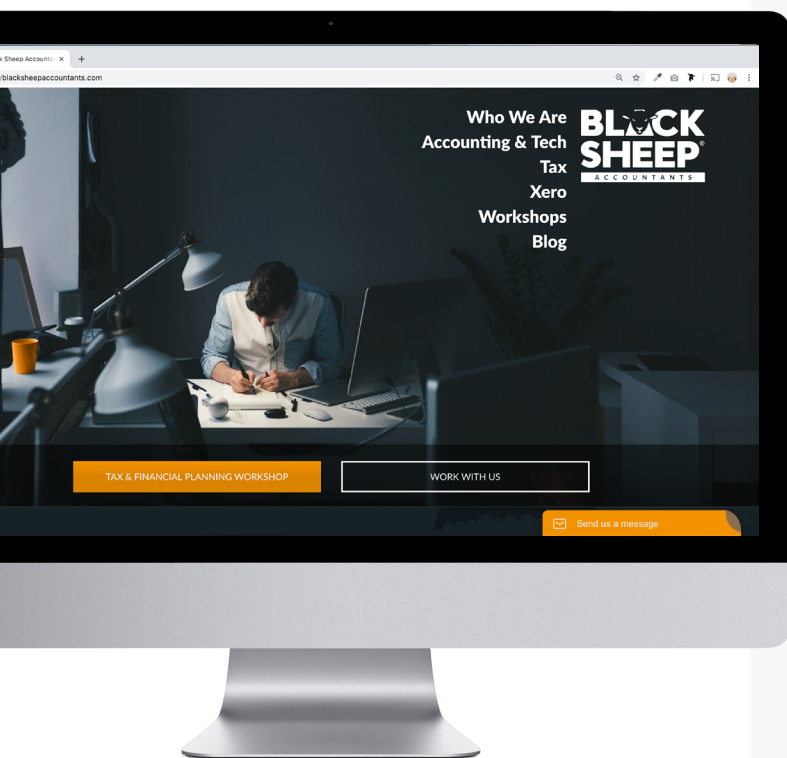
When you're confident you have the right agency and you'll be supported every step of the way, feel free to go all in, on a big project rather than the slow burn. It can save you energy, time, and money in the long run. Always your call.





THE CLIENT EXPERIENCE

Our client Black Sheep in the USA decided to go the whole way - not merely invest a little here and there, but educated themselves by going through the Accelerator, did a full branding identity, and had a new website built.



Here are Kevin's thoughts:

"Brand is more of a vision. It takes a lot of analyzing who you are, what your business is and what you want it to be. There's really no point to even creating a logo until you understand what you're all about. I think investing the time and figuring out who you are and then designing your brand around that vision is incredibly important. If you don't have that, you're just aimlessly wandering into the future.

Until I had this brand and logo, I didn't have who I am and where I'm going solidified in my head. Now that I have my brand, logo and new website, I feel like I'm ready to start writing blog posts and recording more videos. My website is like a garden. Once I'm done planting, it's just the beginning, because all the plants are growing."

**- Kevin Cooper, Owner,
Black Sheep**

Read more case studies from our clients about their client experience [here](#).





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

It sounds like the dream to task us with blog writing and design work and a website build...and go on your merry way, doing your own thing, while marketing magic happens.

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

Your content will be unique, and custom only to you.

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 some of our clients don't need an explanatory call at all.

Marketing does seem to happen magically with very little effort on their part. That's the result of a cumulative investment of time and partnership. We do require a regular co-pilot and tracking call so we can go through your marketing numbers together, and that's your opportunity to ask any question, and make sure your marketing makes sense and is working. Watch this video of Karen's thoughts on how much time is required from you.

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

“The whole course has a knock on effect: I used the knowledge to refresh my website, pin down my tone of voice, then write content and have now moved onto regular blogs. I reinvented and refreshed everything with growing confidence.”

~ **Paul Atkinson**, Lawrence Grant (Accelerator member)





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

The highest performing firms 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.

This makes your marketing work well because it truly reflects your expertise and knowledge, 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 you could look at outsourced sites or a freelancer. They'll be cheaper and faster, it's true. But always remember the age-old rule: of the following three items, you can only ever have two: **Cheap, Fast, and Good.**





We believe accountants can understand and love marketing.

To have the most successful marketing, you need to first be crystal clear about how it works - for accountants in general, and then for your firm specifically. What we've discovered is that as you learn more about it, you begin to love it. Some of our clients move from actually hating or dreading or avoiding marketing, to a place where marketing is the most fun part of their day!

We show you by example how

content marketing is done. It's not about telling people what to do: it's about inspiring them so that they are personally involved in their success. You educate, you train, you inspire, you show.

That's why we built our [Accelerator marketing course](#). 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.

We work exclusively and only with accountants.

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 vs QuickBooks. R&D tax credits. HMRC making tax digital.

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)

When it comes to payment terms, 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.

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 is brainstorming and drafts and ideas and setup and a lot of excitement!

By the time we get to delivery of your draft work, most of the time it means we just need 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 waiting on your feedback.

As an example, for larger website and branding projects, most of the payment is taken in the first few 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

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

- 40% on commencement
- 30% on structure/layout/wireframes/raw design
- 30% on delivery of first draft

MONTHLY retainers - outsourced marketing, social media, etc:

- Usually start on the first of the following month
- If you wish to start mid-month, you'll make the first month's payment immediately and then move to the 1st of the month
- Ongoing payments invoiced & payment taken on 1st of the month

Extra fees for things

As a creative agency, we are conscious 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 the scope changes, you'll need another quote. We will only do work you have approved, and are happy to proceed with.

"I wrote a blog post as part of the Accelerator course and another local accountant sent my post to their client! Turns out this client was a prospect of mine from last year and they couldn't believe it. They already had one foot out the door and their accountant was pushing them out! Big win for content marketing!"

~ **Paul McCann**,
Red Earth (Accelerator member)





What we need from you

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. How dare we be human??

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

Remember, it's a two-way partnership: not a one way command centre. Even if you're frustrated or disappointed, we expect you to:

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





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





Systems we use to deliver your work

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.

Slack

We'll set up a private Slack channel within our PF Community Slack group uniquely for your firm, so you can communicate swiftly and easily with the PF team. One of our life goals is to get rid of as many email threads as possible, and Slack helps make that possible.

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.

Security & logins

We may need to ask you for logins to sites such as Wordpress, social media, CRM systems, and other marketing systems. We use Lastpass to keep these secure; and rest assured we always keep these safe and 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?

Sometimes things aren't working out, for whatever reason. Maybe you feel like you need a breather. Some space. Maybe there are serious financial or operational issues going on in the firm, and you're thinking "It's not you, it's me."

We understand that, and we welcome any conversation we need to have of this kind.. Unless you're in the midst of a 12 month commitment (monthly retainers or training groups), you are only committed on a month to month basis, so you can make changes with 30 days' written notice. (Email is fine.)

What's most important to us is that we are delivering valuable, helpful marketing support in the areas that deliver results for your firm.. 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

wearepf.com

