



# Growth in 2021

The Playbook From  
Cloud Accounting Leaders



# Introduction

In 2020, your firm helped businesses adapt to a global crisis. Your clients were forced to pivot their business models, navigate rapidly evolving legislative updates, and conquer new technological challenges.

The coronavirus pandemic cast a light on the resilience of small business owners and reminded everyone of the invaluable role accountants and bookkeepers play.

We recently asked leaders in cloud accounting firms across the US how their lessons learned in 2020 would shape 2021.

Across the board it's clear: 2021 is going to be a big year. For all the firms we spoke with, 2021 is about making up for lost time, pushing to reach bold strategic objectives, and helping clients get back to normal.

We've compiled the best insights from our conversations in this report. Whatever your goals or challenges in 2021, this playbook will outline the tactics and tools to make 2021 your best year yet.

“Documentation is never the thing you have to do today, but if you don't do it, you can't get to where you want to be tomorrow.”

**TATE HENSHAW**  
Arc Business Management



# The Overview: Here's what top firms advise in 2021



## People

Invest in your #1 asset

1

### Leverage your firm's unique strengths to hire more effectively

Hiring the right people is one of the core challenges firms anticipate in 2021. Their solution? Lean on their unique strengths to give them a leg up over the competition.

2

### Establish a plan for upskilling yourself and your team

With the difficulties of finding the right talent, firms are doubling down on investments in their staff. Leading firms are investing heavily in upskilling their team.

3

### Experiment with new ways to stay connected

Firms cite long-term fatigue from COVID-19 as something to look out for. They're experimenting with new ways to engage with their team to raise morale and energy levels.

# Process

Improve your firm's foundation

- 1 Double down on standardization and documentation of processes**  
2020 highlighted the challenges of key person risk for firms. It's not surprising then that every firm we spoke to is focused on documentation and standardization.
- 2 Invest in scalable client communication**  
Firms with growing client bases identified client communication as a big area of opportunity to improve value delivery and increase firm ROI.
- 3 Balance workloads and create boundaries**  
Burnout is of particular concern in 2021. To avoid it, you need clear visibility into your team's workloads and guidelines to create space for your team to be successful.

# Technology

Uncover new opportunities

- 1 Tap into new opportunities for automation**  
With strong tech stacks in place, firms look to improve their ROI by deepening their use of automation and streamlining integrations between their tools.
- 2 Invest in lead management**  
In the client lifecycle, firms have robust processes from proposal onwards. The next area for improvement? Lead management.
- 3 Strike a balance between data security and convenience**  
Leading firms are investing in strengthening their data security protocols while also simplifying client collaboration. A tricky balancing act.

# Clients

## Firms anticipate unique client needs in 2021

- 1 Identify which of your clients are at risk of falling behind technologically**  
Out of necessity, SMBs leaped forward technologically during COVID. That's great news for many but potentially scary for those who didn't adapt. Do any of your clients fit the bill?
- 2 Remind clients that getting back to normal will be a marathon, not a sprint**  
As we inch towards normalcy in 2021, firms will play a critical role. Getting back to "business as usual" will take discipline and meticulous planning.
- 3 Prepare for shifts in consumer behavior**  
Consumers flocked to online shopping in 2020. 2021 could be the year that people crave in-person experiences more than ever. Will that impact your clients?
- 4 Invest in channels your prospects converge on**  
Connect with your customers where they conduct their business. Don't miss an opportunity to maintain mindshare.



# 01 People



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Aguillard Accounting



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**Hector Garcia**  
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**Nayo Carter Gray**  
1st Step Accounting



**Scott Scharf**  
Catching Clouds

## Invest in your #1 asset

2020 forced firms to lean on their people more than ever. Every firm we spoke to praised their team's resilience through a challenging and unpredictable year.

Consequently, all firms intend to invest heavily in their teams. Hiring, training, and managing team morale are the key objectives.

# Leverage your firm's unique strengths to hire more effectively

Finding and retaining talent in the accounting industry is a well-documented challenge. Heading into 2020, recruiting and retaining good employees was the profession's biggest concern according to [Accounting Today](#).

As Kristen Keats of Breakaway Bookkeeping & Advising put it, "it's the main stress for a firm owner. It's the only way you can scale, you can't do everything yourself or just overwork your employees."

In fact according to [Karbon's report on the topic](#), just 22% of accounting firms say they're confident in their recruiting strategy.

We asked Hector Garcia, founder of Quick Bookkeeping & Accounting, how to find people with the right skills and he responded, "Don't. People are obsessed with finding talent with the right skillset [...] I prefer to hire people that I can teach. The things you can't teach are what I look for: coachability, attitude, etc."

Hector capitalizes on his firm's unique advantage: they are world-class at training. As a result, Hector can prioritize culture fit and help new hires level up in other areas.

"People are obsessed with finding talent with the right skillset [...] I prefer to hire people that I can teach. The things you can't teach are what I look for: coachability, attitude, etc."

**HECTOR GARCIA**

Founder of Quick Bookkeeping & Accounting



Nayo Carter-Gray, founder of 1st Step Accounting, also takes advantage of her firm's unique strengths. She's built a deep network in the accounting community and leverages it to find talent. "I notice people who are asking smart questions and looking for mentorship. I love working with those types of people because they're hungry for knowledge," she said.

Some firms lean on another rapidly evolving option: outsourcing. "I recommend it to everybody," said Kristen. She developed experience working with offshore teams in India and is now expanding operations to Mexico. Outsourcing has been a core part of her business' talent strategy.

To master recruiting in 2021, make sure you're taking advantage of your firm's unique characteristics to gain leverage in a competitive market.



## Checklist:

- If you're planning to hire in 2021, make sure to define your ideal candidate and establish the reasons why they'd join your firm. Narrow your search to channels that can source that candidate profile.
- Consider your firm's greatest strengths and how you can apply those to the recruiting process. Are these strengths that can be showcased in a job posting or on your website? Are they strengths that allow you to distribute your posting in more places than other firms?
- If your firm is considering outsourced accounting, connect with peers that have tried it. A good way to start learning more is evaluating options like TOA Global or platforms like Upwork.

## Resources:

[How I Recruit and Hire New Accountants - Journal of Accountancy](#)

[What Is Outsourced Accounting and How Can It Help Your Firm? - TOA Global](#)

[The Talent Playbook - Karbon](#)

# Establish a plan for upskilling yourself and your team

With finding talent a top priority for so many firms, it's unsurprising that training is a focus for 2021. Across the board, firms are refining their training programs and upgrading their training tools.

Amanda Aguillard, Principal for Aguillard Accounting, put it best saying firms "need a mindset of constantly upskilling their staff. That's going to be a big hurdle for firms that haven't developed consistent methods and technology for training."

Ignite Spot's focus is on training for advisory and controller services. "We want to continue to add more value to what our customers are getting. [To do that] we're providing deeper training for accountant roles, advisory services, and controller knowledge" said Dan Luthi.

Scott Scharf and Catching Clouds have broken up their firm into "crews" that have a specific focus. "In the crews we broke up, we have a data crew for example. We're teaching them how to use Zapier, Airtable, giving them homework, coaching them around specific training objectives." said Scott.

Finding the right tools is a ubiquitous focus, particularly with less access to in person training. "Training's a big focus for us and it's harder in a distributed environment." said Chris Macksey of Prix Fixe Accounting.

Firms across the board are looking to upskill their staff in 2021 and invest in standardized training processes.

## Checklist

- Eliminate blind spots: are there processes that aren't well documented or only understood by a fraction of the staff? Identify and document these areas.
- Identify the skills that your team should already have, then list out the skills your firm would ideally develop over the next 12 months in order to meet your firm's objectives.
- Create a plan for regularly delivering training in bite size chunks for your staff. Ideally a mix of real-time and asynchronous training.
- If you're overwhelmed with the idea of implementing a whole training program, start with the tried and true basics. Give your staff access to training for your firm's core software solutions, make sure to help them brush up on data analysis skills, and have your team shadow you on client calls to build soft skills.

## Resources

[The Case for Upskilling Programs in Accounting Firms - CPA Practice Advisor](#)

[What you Need to Know About Training your Accounting Firm's Staff - Karbon](#)

[How do you Train Accounting Staff - Firm of the Future](#)

[Education for Tech-Savvy Accountants and Bookkeepers - Elefant Training](#)

# Experiment with new ways to stay connected

After almost a full year living with the pandemic, firms are seeking new ways to strengthen team cohesion and morale.

Looking at 2021, Meghan Blair-Valero of Fogged In Bookkeeping said, “I don’t expect it to get easier. I think the long term fatigue can start to set in with people, even if we’re actively trying to manage it, the stress cracks can start to show.”

To combat this, Meghan seeks out new ways to create shared experiences with her team saying, “We’re looking at companies that offer staff experiences over Zoom. [...] You can do improv with a professional comedian, they have something called yoga for people who sit at desks and also something called drunk yoga.. I don’t know about that one.”

Dan Luthi at Ignite Spot is investing further in Sprout at Work, a corporate well-being platform his firm uses to promote wellness. “It’s created an opportunity for our employees to connect in a new way outside of just talking about work, which has been really awesome.” said Dan.

## Checklist

Looking to set up a fun virtual event for your team?

- Figure out when folks would prefer to get together for some planned down time. Determine if the event will involve significant others.
- Make a shortlist of events you can run without any help and then a list of some professional options that you could pay for.
- Give the team a chance to vote on the event they’re most interested in.
- Make it recurring so folks have something to look forward to. A quarterly cadence seems like a safe place to start.

## Resources

[Missed the virtual trivia night for accountants and bookkeepers? Sign up for the next one and bring your team!](#)

[How to play JackBox games with friends and family remotely](#)

[Donut: an app to help you improve company culture & strengthen team relationships](#)

[17 Virtual team building games and activities](#)

[Sprout: a corporate wellbeing platform](#)



# 02 Process



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## Improve your firm's foundation

Foundational improvements took a back seat in 2020. Firms are making up for lost time in 2021 and this will be the year of process improvement for many.

At the top of list was documentation. Firms expect that documenting their processes in great detail will pay huge dividends.

Rounding out the list of top priorities are scalable communication with clients and work management.

# Double down on standardization and documentation of processes

Every firm we spoke to struggled with key person risk in 2020. As a result, firms are doubling down on standardization and documentation of processes in 2021.

“The situation brought into focus the firm’s vulnerabilities around key person risk. This emphasized our need for continued investment in training and specifically documentation.” said Jose Zavala of ZTX Advisors.

The battlecry for 2021 seems to be: standardize and document!

Standardization makes it easier to train your team and also enables automation. Automating a process which is done in a multitude of ways will be far more challenging.

In order to tackle these initiatives, firm owners recommend you start with short processes that are executed often.

“We’ve now documented 90% of our processes. We’ve standardized how we do specific tasks. We’ve documented and retrained our team so that everyone does the same thing.”

**SCOTT SCHARF**  
Catching Clouds





Other firms recommend taking advantage of broader organizational updates you may be planning. For example, for Fogged In Bookkeeping, the move to Karbon presented a perfect opportunity. “In the process of moving into that new practice management solution, we’re really taking the time to document our processes in a great level of detail.” said Meghan Blair-Valero.

## Checklist:

- Identify processes that are not standardized, starting with processes that involve handling a high volume of transactions on a frequent basis. What are those areas that you spend a lot of time on which are ultimately low value to customers?
- What does success look like for this process, how is it measured?
- Map out the process “as-is” and its variants.
- Document the critical path which accomplishes the task in the least number of steps. At this step don’t be afraid to consult your peers to see how they’ve solved for this process.
- Train your staff on completing the task in this standardized way.
- Now that it’s standardized, look for opportunities to automate the process end to end or break it into smaller components that can be automated.

## Resources:

[The Art of Determining and Developing Standardization Processes - Firm of the Future](#)

[Reviewing and Improving Your Process Management - Karbon](#)

# Invest in scalable client communication

2020 forced firm owners to ramp up client communication to respond to PPP updates and state by state restriction changes. For many, that meant investing in channels that enable them to reach multiple clients quickly.

“Being prepared to deliver value-add communications at scale in a timely fashion was a difference-maker in showing the firm’s value.” said Jose Zalava of ZTX Advisors.

This scalable one-to-many communication is a great way to increase ROI on client communication.

Firms should experiment with ways to capture content and distribute it. “We do have the same conversations with our clients all the time. So to the extent that we can capture content, put it in blog posts, put it in videos, really instead of just having 35 meetings with 35 different clients. Instead, I’m capturing that information and disseminating it to all the clients via blog posts, via email newsletters or whatever.” said Kristen Keats of Breakaway Bookkeeping & Advising.

This one-to-many communication is what allows Jason Staats to continue scaling communication at Brenner, LLP. They have over 3,000 clients and as Jason said, “it’s not realistic for us to have one-to-one conversations with everybody. When it comes to changes, updates, or advice for clients, as much as possible we lean into one-to-many communication.”

## Checklist

- Enumerate any topics or frequently asked questions that your firm is addressing with clients repeatedly. Could a video, blog post, or email help alleviate some of the demand on the team?
- Evaluate whether your tech stack enables you to distribute content at scale. Do you have an easy to use blogging platform that your team can access? Does your team use tools like Loom to create videos easily?
- Anticipate any upcoming opportunities to avoid repetitive client conversations. Around key dates in 2021 when can you make the most of one to many communication?

## Resources

Newsletters are a great way to reach all your clients with valuable information quickly. [Here’s a run-down of 18 of the best tools for starting your own newsletter.](#)

Need to make a quick how-to video? [Check out Loom](#), it’s free for videos up to 5 minutes and lets you share with clients easily.

Have you thought about using Slack to communicate with clients? Here’s a [case study](#) that highlights how an accounting firm uses Slack to streamline client communication.

# Balance workloads and create boundaries

For many of us, “always-on” took on new meaning in 2020. We worked from home more, or our families did, making it more difficult to maintain any boundary between our work and personal lives.

Kristen Keats said “client expectations have shifted too. We need to be careful with this on-demand 24/7 thing, we still need to have boundaries with our clients.”

Kristen often recommends the book “It Doesn’t Have to be Crazy at Work” to fellow accountants. She’s found some of the insights helpful. For example, the book promotes “defending your time” to create a distraction-free environment conducive to productivity.

From a management point of view, Meghan Blair-Valero is focusing on workloads saying, “employee workload management is key. Firms need to be attentive to that. We’re spending a lot of time rebalancing workloads.”

Many of the leaders we spoke with recommended investing in a solution that could monitor staff workload.

## Checklist

There’s hundreds of checklists out there on how to be more productive. Here’s what we took from them:

- Establish your 2-3 top priorities for the week ahead.
- Book recurring time in your calendar for uninterrupted work to accomplish the week’s key goals.
- Get on the same page with your team about your availability.
- Mute notifications: office notifications, email, social apps, and your phone. Set yourself up for success by minimizing the likelihood of distraction.
- Give yourself a strict period of time for working. If you don’t set a time period, you’re likely to keep going past the point of diminishing returns.
- Enrich your down time by actively participating in whatever you choose to do. Distracted downtime is unlikely to energize you as much as something you’re actively enjoying.

## Resources

[The Complete Guide to Deep Work - Doist](#)

[An Intro to the Pomodoro Technique - Todoist](#)

(This is a favorite of the Relay team)

[Increasing productivity in an always on world - Karbon](#)

[Learning When to Say No - Harvard Business Review](#)

[It Doesn’t Have to Be Crazy at Work](#)

# 03 Technology



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## Uncover new opportunities

On the topic of technology, firms are focused on three key areas in 2021: automation, lead management, and data security.

As much coverage as it receives, automation isn't a one size fits all solution for every firm. That's why we dug deeper with firm owners to understand how they plan to further automate their practice in 2021. The takeaway? Streamlining the integration between existing tools is where you should invest.

Firms also identified lead management and data security as areas of focus next year.

# Tap into new opportunities for automation

While not all firms agreed on what tools to use, every firm we spoke with agreed that automation was a core part of their strategy.

For those firms reaching substantial scale, Robotic Process Automation (RPA) is also an area of interest.

“We keep going back to Zapier over and over and re-working zaps. There’s so much opportunity there and different ways to leverage it. Zapier is important in accounting, and a lot of accountants haven’t been exposed to it.” said Amanda Aguillard of Aguillard Accounting.

She next shared why she finds Zapier so valuable saying, “you can basically build automation between any cloud packages out there without knowing any coding. You can use it to keep systems up to date, manipulate data, and so much more.”

Scott Scharf from Catching Clouds agreed. He said, “We’ve also leveraged Zapier. We take the manual tasks and automate them. This enables the team to focus on work that they enjoy and no longer the tasks they wanted to avoid anyway.”



In fact, Scott wants to see the firm move closer to a model where they primarily handle exceptions and automate the bulk of the manual work. “For example, I want all the OKs to disappear in Xero. We should have AI do that and then just show us the exceptions where the computer doesn’t know what to do. Most of our time could then be spent reviewing accounting data, validating it, and communicating it to our clients and providing insights.”

For Jason Staats of Brenner, LLP automating repetitive tasks is essential. Their firm handles accounting and tax for over 3,000 clients. Jason says the tax side is more difficult to automate, “The tax suite, it’s a little harder to get there. We’re using RPA to kind of overcome the limitations of those legacy tools. We’re getting good value out of that.”

## Resources

[Accountant’s guide to Zapier: How to Automate Repetitive Tasks - Botkeeper](#)

[Advanced Zapier Guide for Accounting Professionals \(Webinar\) - Practice Ignition](#)

[Applying RPA in the Real World - Accounting Today](#)

# Invest in lead management

Every modern accounting practice needs a standard process for converting prospects into clients.

The firms we spoke with had mature processes for managing existing clients but felt they could optimize their sales process further.

“I feel like a lot of firms are really good from engagement letter on but that there is still a lot of opportunity for improvement before that step. There is more that can be systematized.” said Amanda Aguillard of Aguillard Accounting.

Jose Zavala of ZTX Advisors strongly agrees. He said that in 2021, “Lots of the focus is on the sales process, really tighten that up, [...] trying to get more of it automated. There’s lots of automation in the accounting space but sales is one area that really can be automated to a high ROI.”

Firms focused on growth in 2021 should ensure they have a standard lead management process and detailed reporting to monitor the results.

“I feel like a lot of firms are pretty good from engagement letter on but that there is still a lot of opportunity for improvement before that step. There is more that can be systematized”

**AMANDA AGUILLARD**

Aguillard Accounting



## Checklist

- Use a CRM: Collecting and organizing actionable customer data using a CRM is a key tool in effective lead management.
- Implement defined stages: The goal here is to map out your customer's buying journey into distinct phases and understand how to optimize each step in the process.
- Score leads: Lead scoring helps you understand where to allocate your resources.
- Build a lead nurture process: This is where you build and automate relevant email, phone, or social communication. The goal is to nurture leads until they're ready to buy.
- Track & measure: Track each prospect's progress so that you can understand how to optimize your funnel.
- Maintenance: Data hygiene is key. Ideally you can automate your data tracking so that your CRM is always up to date.

## Resources

[Ultimate Guide to Managing the Lead Lifecycle - Tray.io](#)

[How to Manage Sales Leads - Active Campaign](#)



**“We must do everything we can to make sure that we are not the source of data breaches or loss. It’s one of the things I always call out especially for firms moving online”**

**NAYO CARTER-GRAY**  
1st Step Accounting



## Strike a balance between data security and convenience

Cybersecurity is still a top priority for firms in 2021. Firms look to enhance their security practices and improve customer experience. This can be a tricky balancing act.

Firms are seeking solutions that enable easy client collaboration and don't compromise data security. Moreover, they're making sure clients are a part of the effort.

For Dan Luthi at Ignite Spot, one area they're doubling down is expectation setting with clients. “In our initial communication with clients we share with them what's to be expected, we walk them through everything and what all interactions should look like.” he said.



## Checklist

Common threats to be aware of:

- Social engineering
- Phishing
- Ransomware

Common steps that firms are taking to protect their clients:

- Ensure you have an updated antivirus that is activated
- Use strong passwords
- Exercise skepticism, for example never click links in emails.
- Communicate and exchange data as securely as possible, that means no sensitive data over email or other insecure platforms
- Have a good backup system in place for your key tools and datasets
- Delete old, irrelevant data files
- Make sure your whole team is trained on best practices
- Reduce your risks with the right tools and cyber security insurance

## Resources

[How to Balance Security & Convenience with Clients \(Webinar\)](#)  
- Relay, Liscio, McGowanPro

[10 Cybersecurity Best Practices for Remote Environments - Accounting Today](#)

[Now in Hacker's Crosshairs: Accounting and Finance Firms](#)  
- CPA Practice Advisor

# 04 Clients



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1st Step Accounting



**Tate Henshaw**  
Arc Management

## Firms anticipate unique client needs in 2021

Many of the firm leaders we spoke with were already thinking about the changes their clients would experience in 2021.

How should they manage cash flow on a longer timeline? How will reopening impact their businesses and what do we do if there is a set back? Has consumer behavior changed for the long run or will it revert back to “normal”?

There’s still a lot of work to be done as we tackle 2021.

# Identify which of your clients are at risk of falling behind technologically

The silver lining for advisors in 2020 was that their clients showed remarkable resilience. Many small business owners were forced to level up quickly during the pandemic.

Nayo Carter-Gray of 1st Step Accounting said her clients “switched gears really quickly. A lot of them adapted to figure out additional revenue streams.”

In fact, one broad trend that all firms commented on was the accelerated adoption of technology. “The small business economy has probably fast-forwarded 3 years as a result of COVID.” said Amanda Aguillard of Aguillard Accounting.

The downside, Amanda said, is that “there’s a bigger divide between those small businesses that haven’t pushed forward technologically through this and the businesses that have.”

If you have clients who clung to old habits through the pandemic, it may be time to urge them to close the gap technologically.





## Remind clients that getting back to normal will be a marathon, not a sprint

In 2021, Tate Henshaw of Arc Business Management expects that “clients are going to be starving to get back to normal, they might be rushing it.”

Advisors, just like their clients, are itching to get back to normal. That makes it doubly difficult to help clients take a measured approach and stay prepared for possible setbacks. Tate concluded that we have to help clients “take it one step at a time and be diligent in helping them get re-started.”

Meghan Blair-Valero echoed the sentiment suggesting that we can hope for a speedy resolution but we should be ready for the alternative. She said, “if there’s no magic bullet coming soon, we may be in this for a little longer than expected” and “short-term cash management is often easier than long-term cash management.”

Help your clients make the most out of 2021 by taking a measured approach and not casting the pandemic to the rearview too early.

# Prepare for shifts in consumer behavior

There's no easy way to know how 2021 will unfold but, fingers crossed, we're likely to be gradually getting back to normal.

But what does that mean for your clients?

2020 was the year of online commerce but will we see the pendulum shift in 2021? When vaccines become widely available, could people be in desperate pursuit of more in-person experiences and prop up huge gains in the hospitality and tourism industries?

"In 2021, if the vaccine is out, people are going to leave their homes and not come back for six months. People are sick of being home. The sectors that are going to benefit the most are tourism, hospitality, lodging. It is going to be like Mardi Gras for 300 days!" joked Chris Macksey of Prix Fixe Accounting. "We could really see a blockbuster year for the hospitality industry if these chips fall correctly." he said.

No one has a crystal ball but the advice from top firms is to think about how shifts in consumer behaviour could impact your clients in 2021.

# Invest in channels your prospects converge on

When Jose Zavala at ZTX Advisors started catering to clients in the fitness industry, he quickly realized that they were a great fit for his services. He also learned that his classic acquisition channels wouldn't be as effective.

Jose pivoted. He developed a lead generation strategy using Instagram, where fitness professionals build their brand and engage with each other.

He rapidly built a niche on the channel and said, "We've found a lot of success through different channels that we didn't anticipate would be effective. Instagram for example, is a great place to connect with our prospects."

Jose prefers to leverage the platform for its core value: generating awareness and building relationships. "We interact directly with them, leave comments, like their posts, all of which leads to a conversation and the start of a potential business relationship." he said.

# How will you unlock your firm's potential in 2021?



Our biggest takeaway from these conversations: despite the challenges of 2020, there has never been a better time to run a virtual accounting or bookkeeping firm.

Simply put: the pandemic reinforced the value of advisors. Moreover, the accelerated adoption of cloud technology among business owners has dramatically reduced the barriers to running a virtual firm.

More profoundly, there has been a powerful shift in the relationship between firms and their clients. "With virtually every business owner now running a distributed team, integrating your accountant into that team is much easier to wrap your head around." remarked Jason Staats of Brenner, LLP.

In 2021, accountants and bookkeepers can deepen their client relationships and become part of the fabric of their clients' teams like never before.

**Is your firm on track to having its best year yet?**

# Acknowledgements



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Ignite Spot



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# In partnership with



## Relay

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Learn how employees are saving 13 hours per week with Karbon.

[Learn More](#)

