

# VALUE-ADDED SERVICES

Module 5: Client Acquisition and Retention



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## Value-Added Services Workbook

Welcome to the Value-Added Services Workbook. This workbook is designed to help you identify, design, and deliver value-added services that go beyond core accounting — creating deeper client relationships, generating recurring income, and positioning your firm as a strategic partner.

By completing the tasks and exercises in this workbook, you'll develop a clear plan to expand your service offering, communicate your value more effectively, and build a more resilient, future-ready firm.

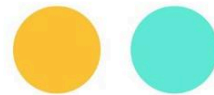
### Instructions:

- **Reflect on Your Current Accounting Offer:** Begin by mapping out your existing accounting services. What do you currently deliver (e.g. monthly reports, forecasting, bookkeeping)? Where are clients asking for more support or insights?
- **Identify Opportunities to Add Strategic Value:** Look for areas where your accounting work already supports decision-making. Could you package these insights into ongoing advisory services like virtual CFO support, cash flow planning, or sector benchmarking?
- **Define Your First Value-Added Offer:** Choose one area to develop into a pilot service. Be specific about who it's for, what challenge it solves, and what outcome it delivers. Think of this as a low-risk way to test and refine your approach.
- **Evaluate Fit and Feasibility:** Review your team's skills, tools, and capacity to deliver this service. Do you need to upskill, partner with a specialist, or streamline your delivery to make this scalable?
- **Set SMART Objectives for Launch:** Define specific, measurable, achievable, relevant, and time-bound goals for your pilot. For example: onboard 3 clients into the new service within 60 days or generate £2,000 in recurring income per month.
- **Build Your Delivery and Communication Plan:** Outline how you'll deliver the service and how you'll communicate its value to clients. Draft simple messaging, pricing, and delivery workflows. Focus on clarity and client impact.
- **Launch and Monitor Results:** Roll out your pilot. Use client feedback and performance metrics to track how it's going. Are clients engaging? Is it profitable? Are your team members clear on what to deliver?
- **Refine and Scale:** Use the insights from your first offer to improve it and consider adding others. Build your value-added services into your core firm strategy, and turn them into a consistent revenue stream.

**By the end of this workbook**, you'll have a practical roadmap to turn your accounting knowledge into ongoing value for your clients — and sustainable growth for your firm.

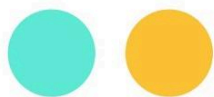
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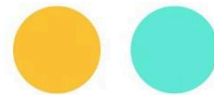




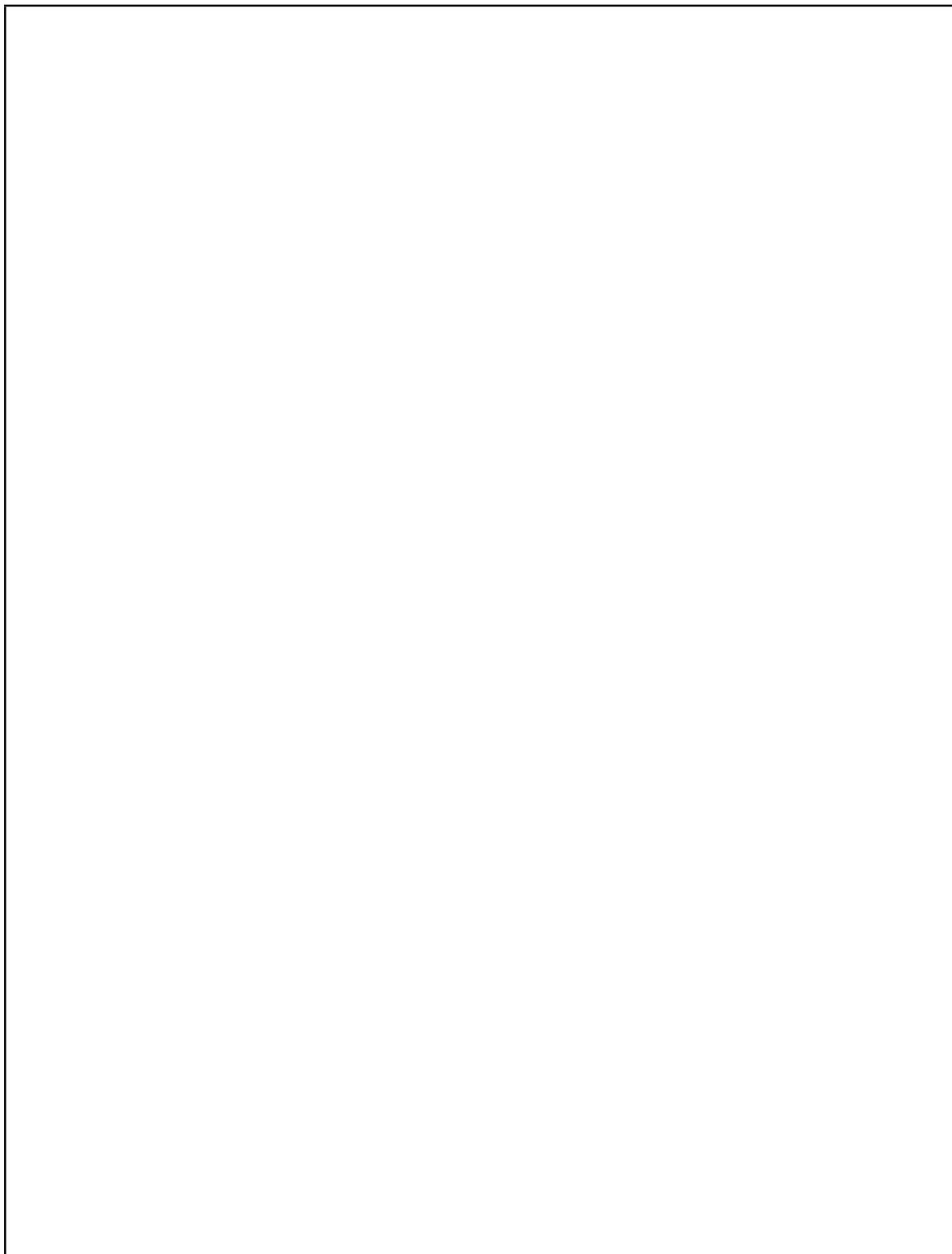
## Section 1: Plan Extra Services

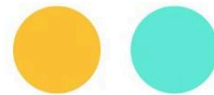
**Map your current core services:** List the accounting services you deliver (e.g. management accounts, cash flow reporting, budgeting, forecasting). Also list your areas of expertise and interest.



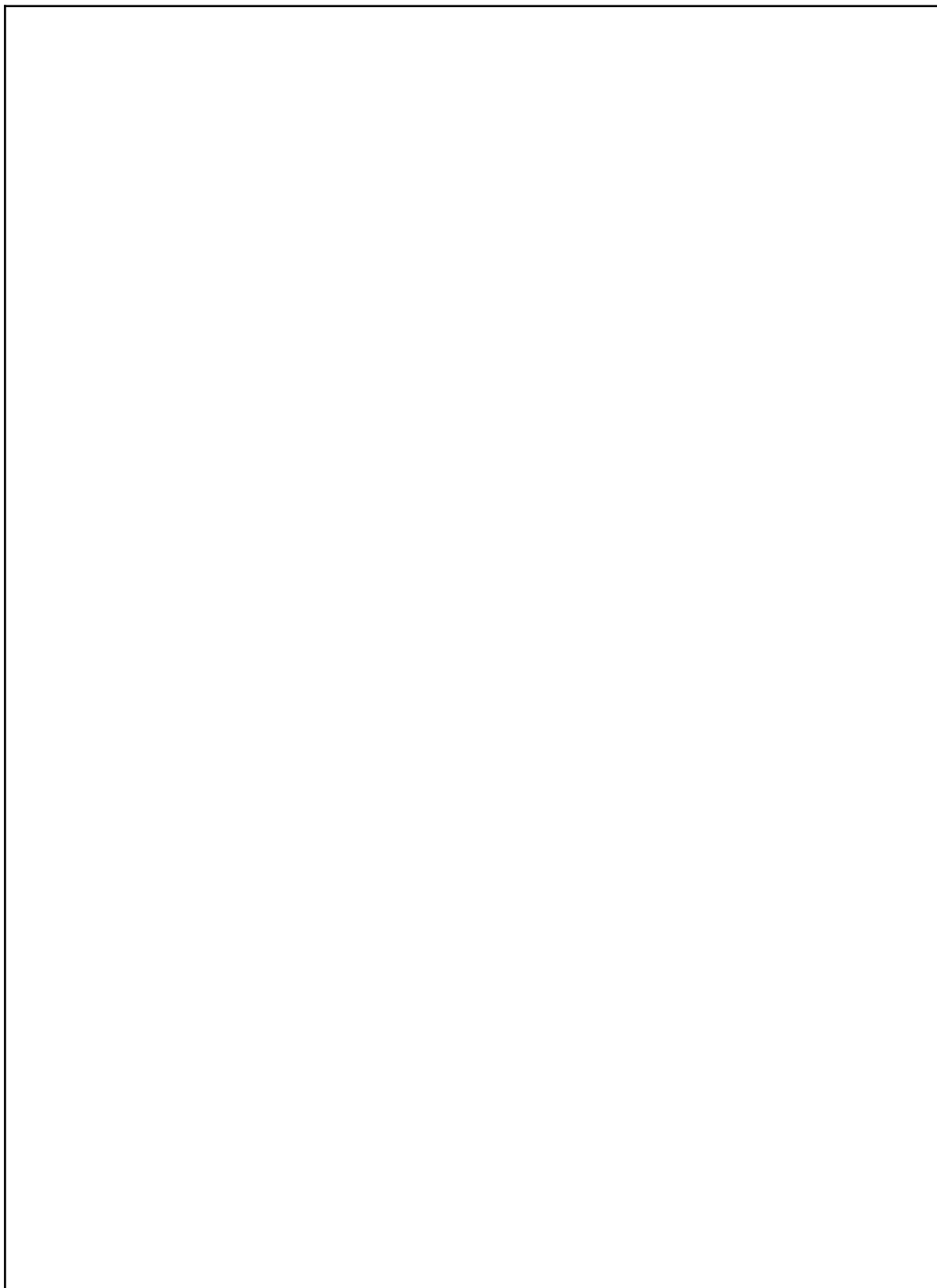
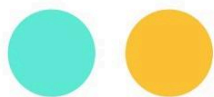


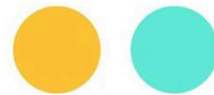
**Identify where clients are asking for “more.”:** Note client questions or needs that fall outside the basic accounting scope — e.g. “Can you help me plan for expansion?” or “What do these numbers mean for next quarter?”

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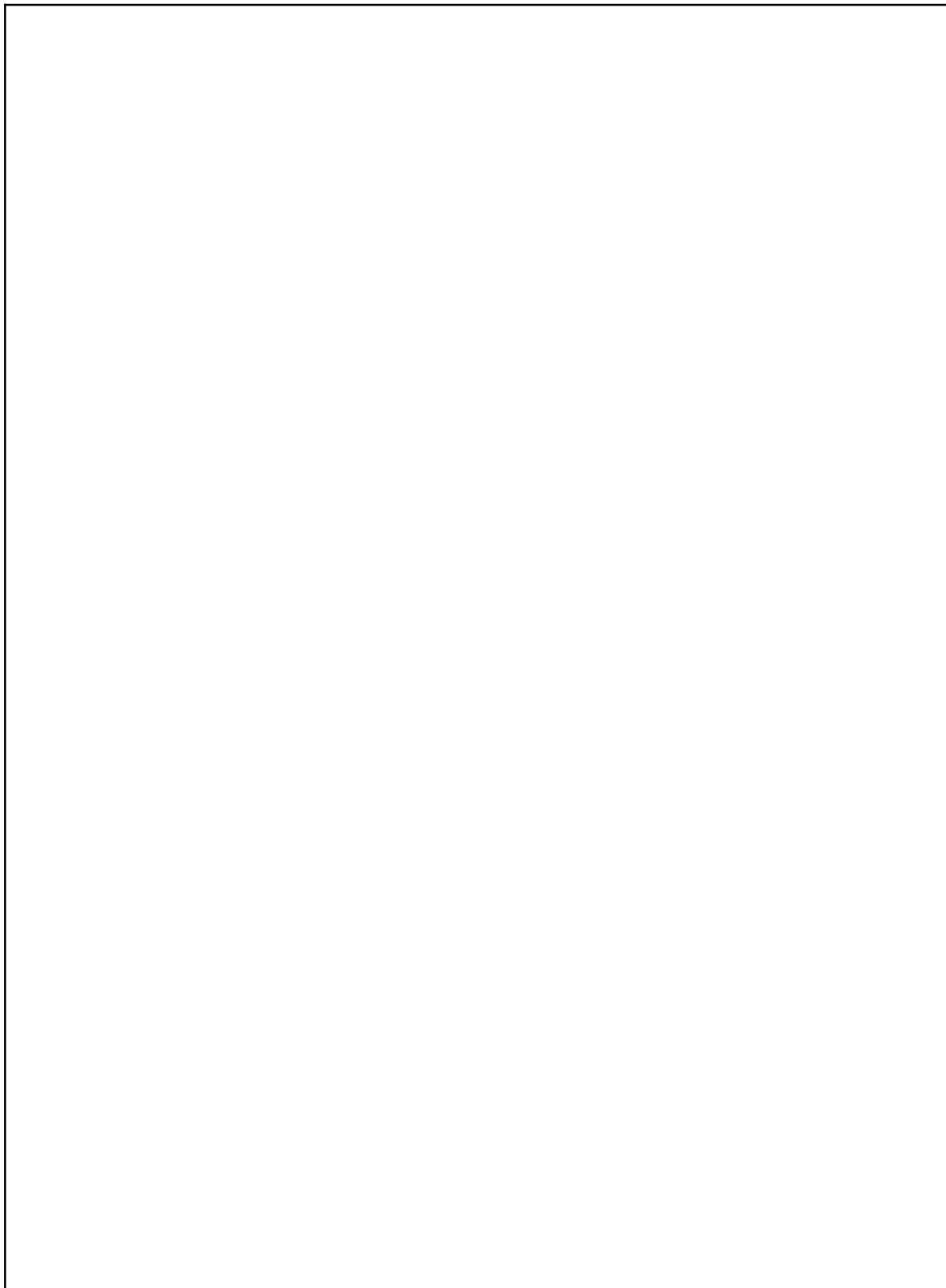
**Highlight moments where you provide insights, not just reports:** When do you help clients make decisions based on the numbers? Capture 2–3 recent examples.

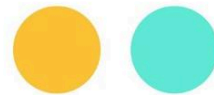
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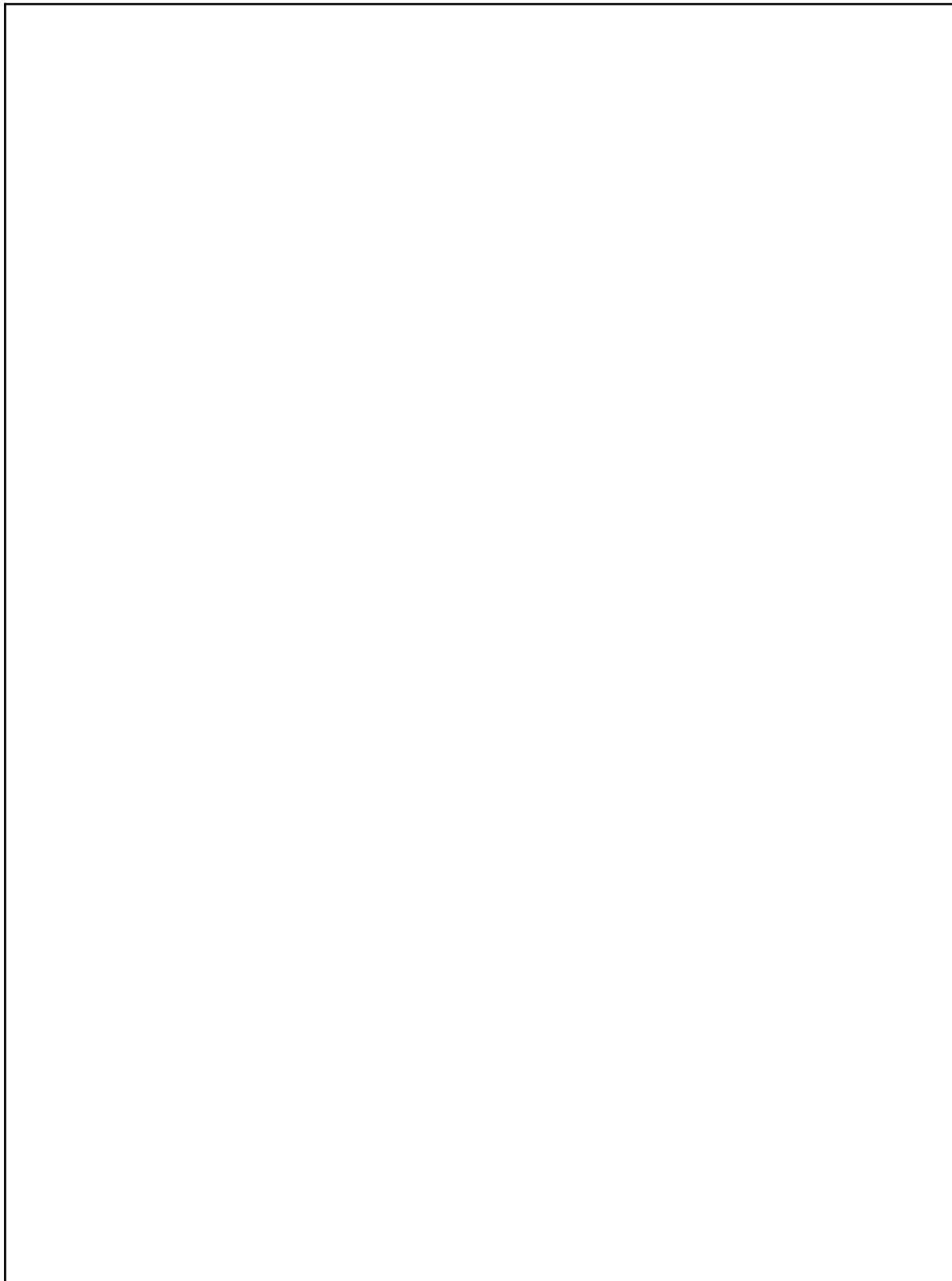
## Section 2: Design Value-Added Accounting Services

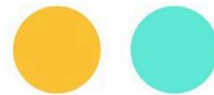
**List strategic services you could layer onto your accounting offer:** E.g. virtual CFO support, pricing analysis, dashboard setup, industry benchmarking, board reporting.





**Create a small pilot offer:** Design a test service for existing clients — e.g. “Quarterly Performance Review Call” with commentary + next-step actions. Name it, define the outcome, and write a short pitch you could use in a client meeting.





### Section 3: Tools and Team Strengths

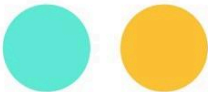
**List tools that could help you scale value-added services:** Think about dashboards (Fathom, Syft), templates, reporting tools, call schedulers, AI assistants.

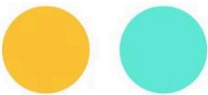




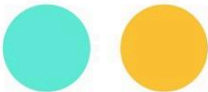


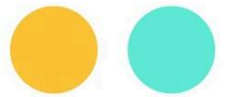
**Match services to your team's strengths:** Who is analytical? Who enjoys client interaction?  
Match roles to service delivery.





**Plan for skills you need to develop or hire:** What’s missing? Add a short action to fill the gap (e.g. “Train senior staff in client advisory techniques”).





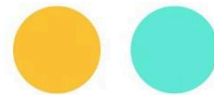
## Section 4: Communicate the Value

**Write a benefit-driven description of one value-added service:** Focus on the outcome: “Helps you understand what’s driving profit — and what to fix.”

**Draft a message to reframe how clients see your accounting role:** Example: “We don’t just give you numbers. We help you use them to make better decisions.”

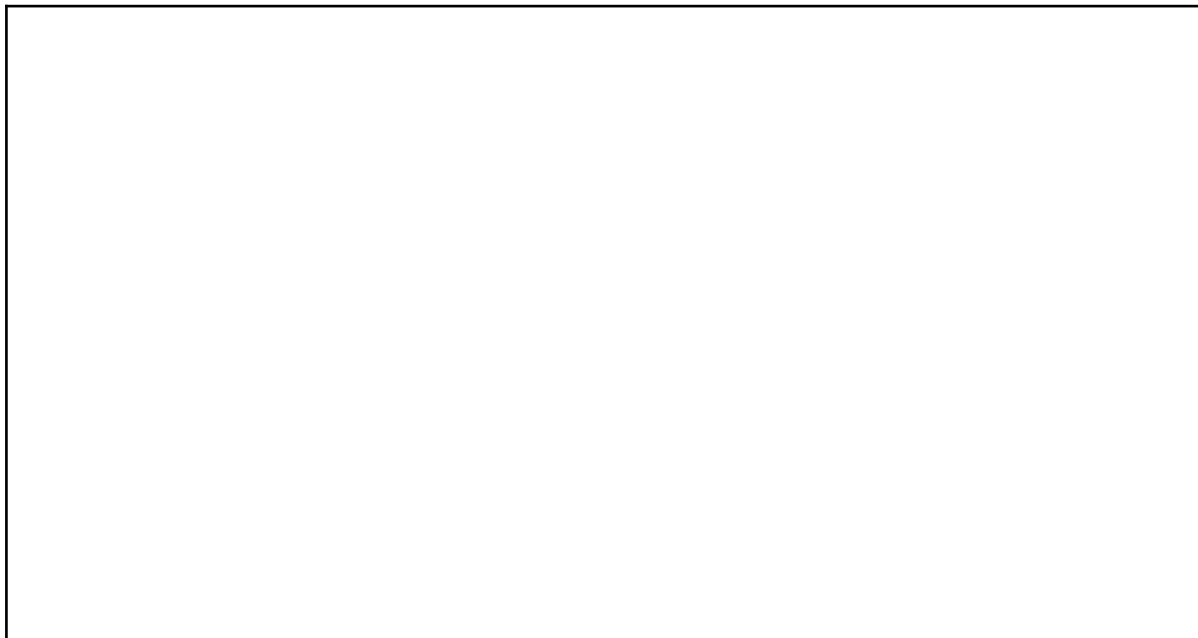
**Identify 2–3 clients to test your new messaging with:** Pick clients you have strong relationships with and start the conversation.






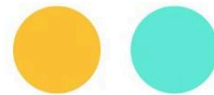
## Section 5: Track and Optimise

**Choose 3 key metrics to track impact:** E.g. Number of clients using value-adds, additional monthly revenue, client satisfaction score.

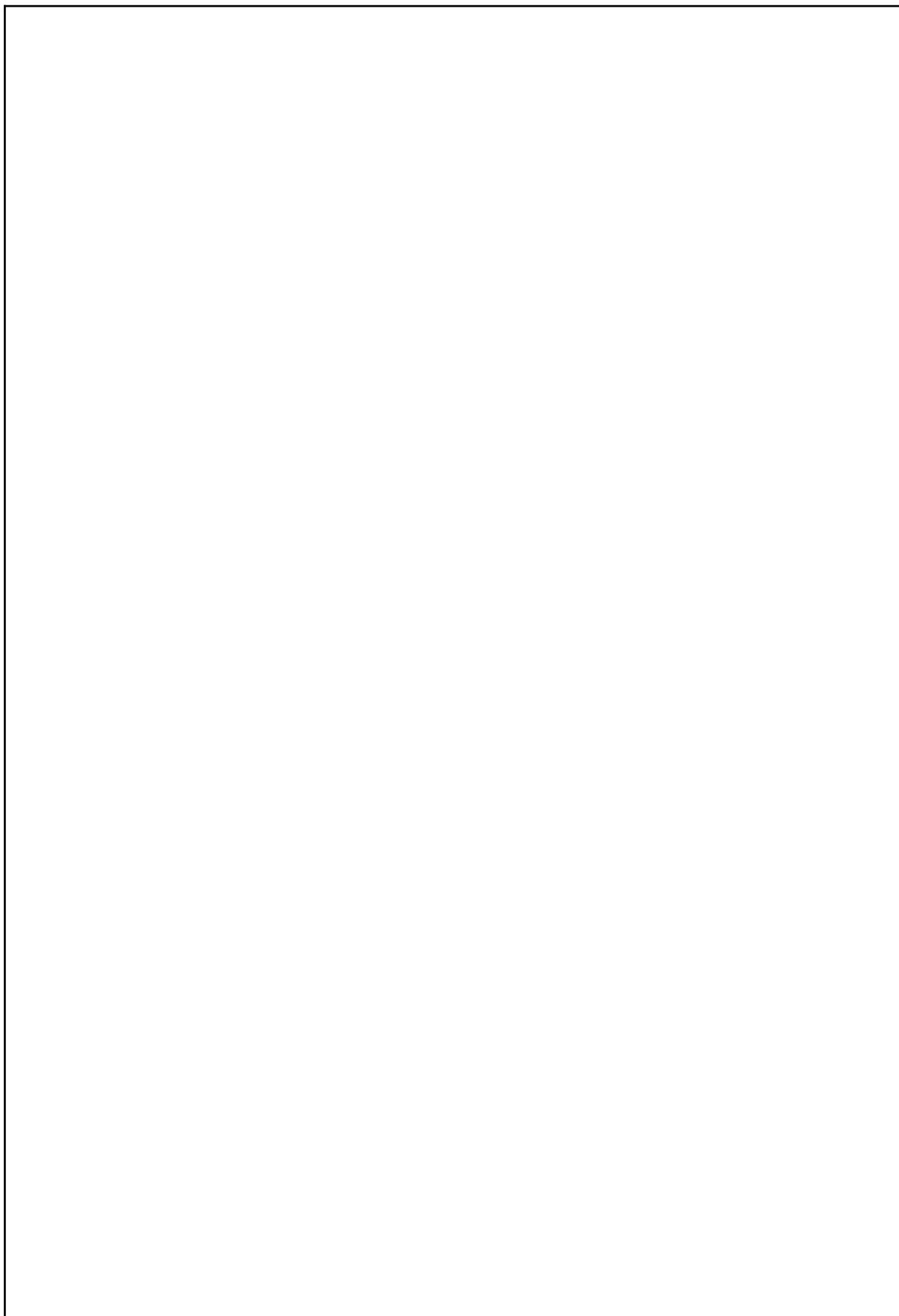
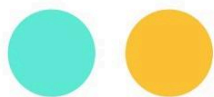


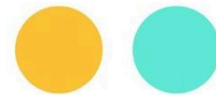
**Schedule a review:** Book a date now to assess what's working, what to tweak, and what to scale.





**Set a 90-day test plan:** What will you trial? With whom? What does success look like?

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## Congratulations on Completing Your Value-Added Services Workbook!

You've taken important steps to evolve your firm from compliance-focused to value-driven — designing services that deepen client relationships, generate recurring income, and position your firm as a strategic partner.

### Here's What to Do Next:

- **Review What You've Designed:** Look over the service ideas and messaging you created. Which value-added service has the most potential for client impact and recurring revenue? Start there.
- **Set a Clear Pilot Goal:** Pick one service to test. Define what success looks like (e.g. onboard 3 clients in 60 days, generate £2,000/month in recurring revenue) and set a simple, trackable timeline to launch it.
- **Build a Repeatable Delivery Plan:** Clarify how the service will be delivered—who's responsible, what's included, and how it will be priced and communicated. Keep it simple, but make sure it's client-ready.
- **Communicate the Value:** Update your website, proposals, or client emails to reflect the new offer. Show why this service matters, not just what it includes. Use clear outcomes, examples, or mini case studies if you can.
- **Collect Feedback and Iterate:** After launch, speak to clients and your team. What's working? What's unclear? Use that input to improve how the service is positioned and delivered.
- **Think Ahead:** Once your first service is running smoothly, look for opportunities to expand your value-added offer suite. Could you offer a higher-tier package? A complementary service? This is how you build recurring revenue and client loyalty.

### Final Thoughts:

Adding value-added services isn't about doing more work—it's about delivering smarter, more strategic support that clients genuinely want. You've now got the structure, tools, and ideas to start turning your firm into a true advisory partner. Don't wait for the perfect moment—launch, learn, and refine as you go.

Ready to scale what you've started? This is where your next phase of growth begins.

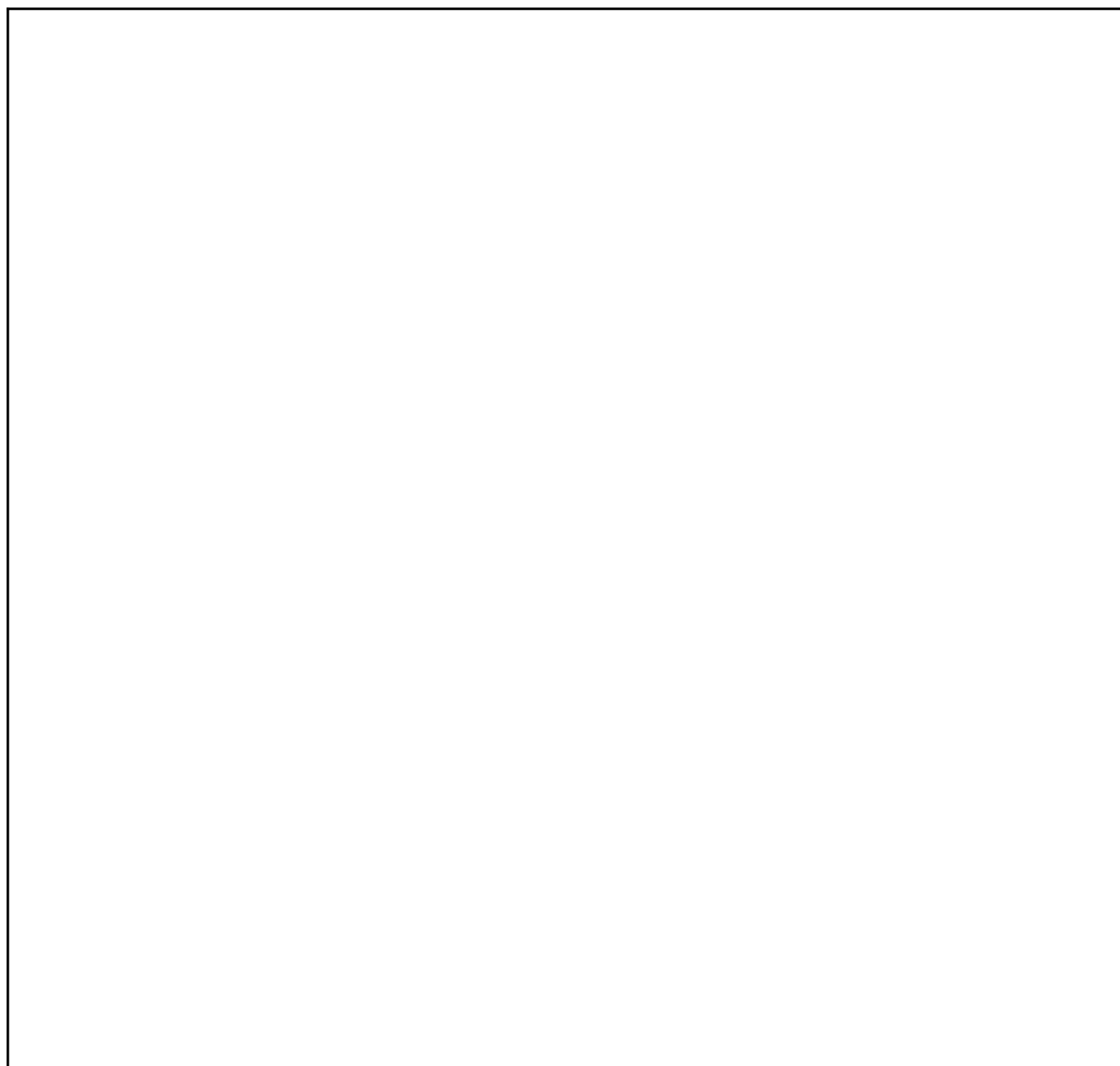
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## Additional Notes

Please use this section to fill in the most important points and any other notes or ideas you have about your Growth Action Plan.



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