



Hawkins Priday
ACCOUNTANTS

Client Success Program

Onboarding your new accounting function



Welcome on Board!

This program has been provided to guide you through your onboarding as a new client of Hawkins Priday. We hope you are as excited as we are to start working together.

Following our program will allow you to set your business up for long term success, with the knowledge that you have the full support of your own customised finance function.

Strap in, and let's make a start!

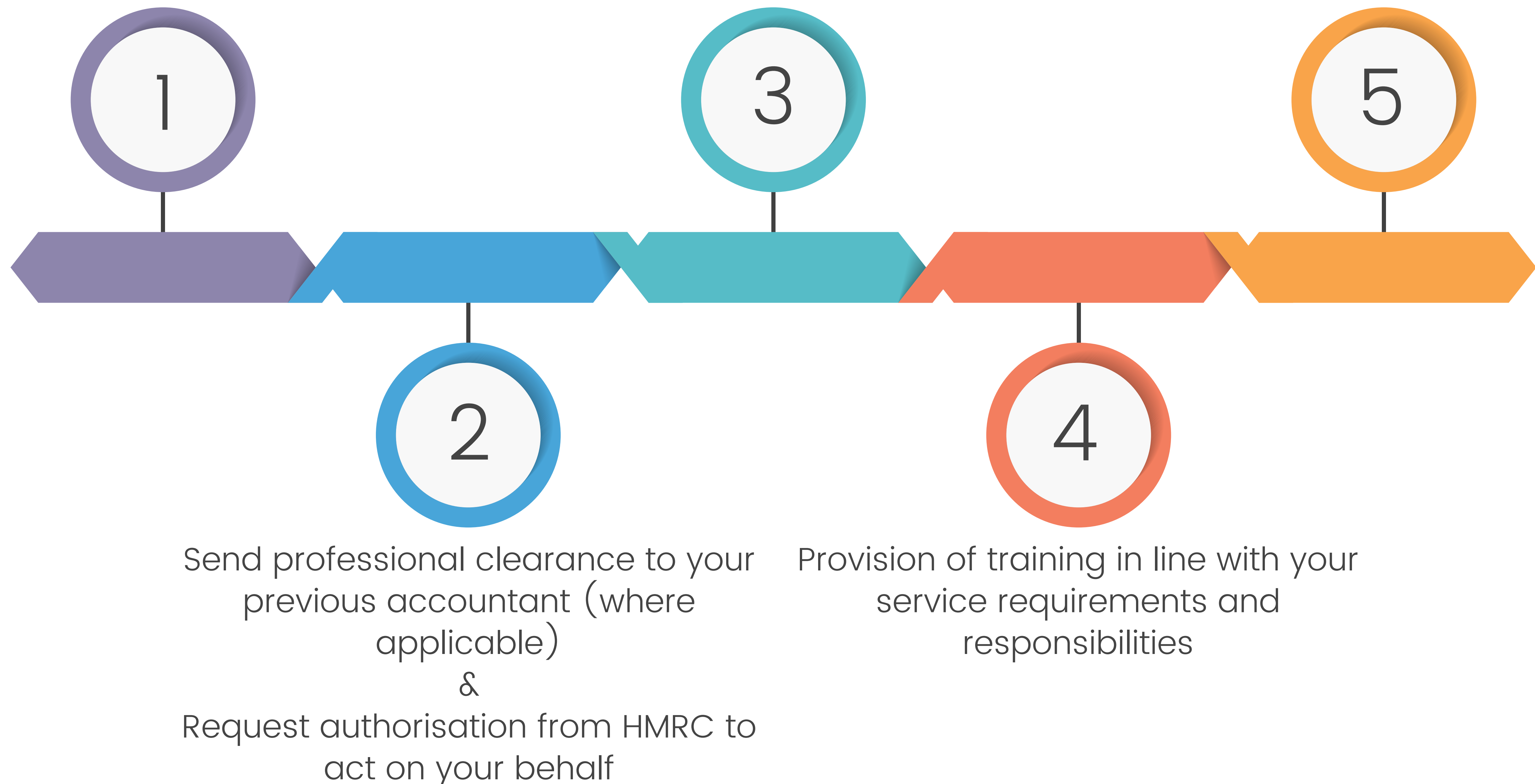
The Onboarding Process

The timeline below sets out the steps involved in getting your finance function up and running.

Get you onboarded with Hawkins
Priddy – proposal signed, direct
debit set up, money laundering
checks complete

Build a data flow system and agree
our respective responsibilities – Book
in next steps and agree upon dates
for services to be provided

Initial check up – Confirm all
systems are working and ensure
service levels are appropriate



Our Company Mission:



To make a real difference to the lives of our clients
and to help people achieve their goals.

Making A Difference

Professionalism

Dependability

Having Fun

Family & Friendships

Teamwork & Collaboration

**Our Team
Values**



Our Promise To You

We want to provide you with the best service possible so we have put various systems in place to ensure we do just that.

Whether that be our 24 hour response deadline, our top of the range phone system to allow the team to take your call from anywhere, or our super communications platform that allows us to keep a detailed timeline of all your activity and correspondence in one place.

Our promise is that we will endeavour to provide you with the best service that you've ever received from a professional service firm.

Your Role

It takes two to make a thing go riiiiight...



What We Need From You

Our expectation from you:

Explanation of why we need it:

Talk to us! Please...

To communicate with us at least once a quarter. Even if that's just for a catch up.

Whether it's a question about your books, an update on your business, personal news about a new baby in the family – The more we know, the more we can help. Better to have us in your ear now, than lose £'000s in tax because you didn't ask.

Respond to our emails and 'client requests'

To respond to our communications within a few days, even if that's to say you'll get back to us next week.

We love helping our clients! But we can only do this if they work with us. Where clients make a habit of not responding to us, to the point where it's stopping us from helping them, then we must re-evaluate whether we are the right fit for them.

Shout if something isn't right

To agree to an open and honest relationship of mutual benefit.

With the best will in the world, we know we won't always get everything right – we're human. We operate an open honest culture, and if something isn't working for you, just say so that we can fix it.

Your Support System

Here are some of the resources that we provide to help support you.



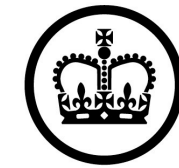
Croner-i

A comprehensive catalogue of support services for individuals and business owners – From employment contracts to business improvement plans. If you need any business support, it's very likely that we will have a tool to help.



B1G1 Contributions

By being a client of Hawkins Priday, you are automatically supporting the B1G1 movement and contributing to good causes around the world.



HM Revenue
& Customs

Tax Fee Protection

If HMRC ever investigate your affairs, we've got you covered. Time taken in dealing with HMRC and providing the information they require can be onerous. This is insurance that covers our fees for any work we do in assisting you with a HMRC enquiry, included as standard.



HR Helpline

Our clients receive free access to our associated HR helpline to assist with any personnel issues you may face.



HawkinsPriday.co.uk

There is a long list of personal and business resources on our website, including tax calculators, Companies House and HMRC forms and ongoing tax and business updates. You can even access information to assist with tax planning strategies, such as retirement planning.



HP Newsletters

Our regular email updates keep you in the know of important tax and business updates, ensuring you stay on top of the ever changing rules.

Onboarding Checklist ✓

These are action items to be accomplished in your first month as a HP client.

Approve proposal & direct debit ☐

Provide ID/proof of address ☐

Authorise us to contact your previous accountant ☐

Check you are signed up to our newsletters ☐

Leave us a 5* google review, and shout about how awesome we are. ☐

Frequently Asked Questions

Why do you need to contact my previous accountant?

We are required by our governing bodies to request 'professional clearance' from your previous accountant, which involves requesting handover information, and to ask whether there is any reason why we shouldn't act for you as a client.

What is HMRC authorisation?

We request authorisation from HMRC to act as your agent. This provides us with access to your online HMRC account, and will allow us to speak directly to HMRC on the phone regarding your tax affairs. This allows us to work with HMRC on your behalf where necessary.

What is Karbon?

Karbon is our communications software. It allows us to keep a detailed timeline of all correspondence with you, and to assign tasks internally. It also allows us to send tasks to you to complete, in which you can upload documents and add comments where we require additional information from you.

What is OpenSpace?

OpenSpace is a secure document portal. We can upload files to each other and send documents to you for digital approval/signature using this platform. You will receive your own personal log in details for this platform.

Do you have other questions?

If you have any other questions do not hesitate to reach out to your manager. All members of our team can be contacted by calling the office number.

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Welcome on Board



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