



ACCOUNTANTS WHO LEAD
COMMUNICATION | COACHING | PRESENTING

10 Ways Accountants in Practice Can Coach Themselves for Greater Success

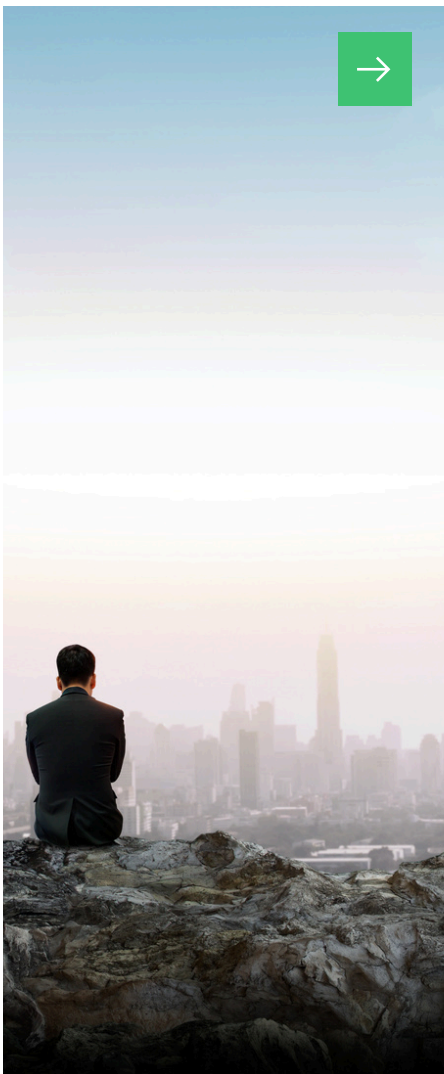


Introduction



Coaching doesn't always require a coach—sometimes, the best solutions come from within. These ten strategies are designed to help accountants running or partnering in a practice gain clarity, build confidence, and take actionable steps toward success. Use this guide to coach yourself toward growth and measurable results. Whether you're tackling leadership challenges, seeking to overcome impostor syndrome, or simply want to improve your practice's performance, these tips will get you started.

1. Define Your Vision



Take 15 minutes to articulate what success looks like for your practice in 3, 5, and 10 years. Be as specific as possible. This clarity will keep you focused and motivated.

Example:

In 3 years, you might aim to serve 50 high-value clients generating a net profit margin of 30%. By year 5, you plan to expand to a second location. By year 10, you envision becoming the go-to consultancy for SMEs in your city, recognized for offering both tax advisory and business growth coaching.

2. Identify Your Limiting Beliefs



Write down the thoughts that hold you back—“I’m not a good leader” or “I can’t grow my practice further.” Challenge each one by listing evidence that proves them wrong.

Example:

A common belief might be, “Clients only see me as a tax preparer, not a strategic partner.” You can challenge this by highlighting times when clients sought your advice on their business strategy, showcasing your ability to deliver value beyond compliance.

3. Set SMART Goals



Break down your vision into Specific, Measurable, Achievable, Relevant, and Time-bound goals. This turns big aspirations into actionable steps.

Example:

Instead of saying, "I want more clients," set a SMART goal like, "Acquire 15 new clients within the next 6 months by attending 3 local networking events per month and following up with personalized emails."

4. Conduct Weekly Self-Reviews



Every Friday, spend 20 minutes reviewing your week. What worked? What didn't? What's one thing you'll do differently next week?

Example:

After a review, you might notice that onboarding a new client took longer than expected because of unclear documentation requirements. Next week, you could create a standardized checklist for smoother onboarding.

5. Track ROI on Your Time



Your time is one of your most valuable resources. Regularly review how you're spending it and ensure your activities align with high-value goals for your practice.

Example:

If you find you're spending 15 hours a month manually inputting client data, investing in automated software or an outsourced book keeper might free up time for more value-add activities.

6. Practice Leadership Communication



Before delivering key messages to your team or clients, practice aloud. Focus on clarity and confidence. This can significantly improve how others perceive you.

Example:

When introducing a new pricing model to a long-term client, practicing beforehand can help you confidently explain how the change reflects the value you provide, avoiding awkwardness or pushback.

7. Take a Strengths Inventory



Make a list of your top 3 professional strengths and reflect on how you can use them to improve your practice or tackle current challenges.

Example:

If one of your strengths is staying updated on regulatory changes, leverage it by creating a monthly newsletter for clients, positioning yourself as an industry thought leader.

8. Create a "Wins Journal"



Keep a record of weekly achievements—big or small. Regularly reviewing this can boost your confidence and help overcome impostor syndrome.

Example:

Record moments like helping a client save £10,000 through strategic tax planning or receiving positive feedback from a workshop you delivered to local entrepreneurs.

9. Prioritize Self-Care



Your performance as a leader improves when you're at your best. Ensure you're prioritizing physical health, mental well-being, and downtime to recharge.

Example:

Schedule non-negotiable time for activities you enjoy, such as a weekly gym session or a family walk. Over time, this balance helps prevent burnout and keeps you performing at your peak.

10. Be Your Own Accountability Partner



Set regular check-ins with yourself or a trusted colleague to review progress on your goals. Treat these as seriously as you would a client meeting.

Example:

Partner with another local business owner to exchange progress updates monthly. Share goals like increasing client retention by 10%, and celebrate successes together to maintain motivation.

Follow Up

↘ If you apply any of these actions we believe it will have a positive impact on your effectiveness in your accountancy practice. If you want help to achieve this success:



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