

10 Ways better meetings drive success for accounting firms

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Professionals spend on average two hours a week in pointless meetings. The result? Poorly organised meetings cost the UK **£46 billion** and the US **\$399 billion** each year.¹

The world has changed. It's time your meetings changed, too

COVID-19 will have a lasting impact on businesses around the world, sparking new ways of working, increased adoption of technologies and a greater emphasis on more prudent business practices.

Perhaps, like many accountancy firms, you're taking a hard look at your own working practices, looking for ways to improve business performance and deliver greater value to clients in difficult economic times.

One area that's ripe for improvement in almost every business? Meetings. Most meetings are done poorly, leading many accountants (and their clients) to believe they're a waste of time. This is a missed opportunity, and an easy problem to fix.

Meetings are by far the most effective way to build relationships and make decisions. Well-structured, properly executed meetings bring issues to life, align people to key goals and inspire action. To put it another way, better meetings will help you build a more successful accounting firm.



From client meetings to internal team meetings, face-to-face discussions to Zoom and telephone calls, all meetings matter. That's why every company must build a culture of better meetings.

¹ Source: The state of meetings report 2019; Doodle

Better client meetings...

1

Save time

With a structured approach to meetings, you can prepare clients for the discussion and increase client accountability. And that means you spend less time on chasing and follow-ups.

2

Boost perceived value

As a result of more defined discussions, your clients will better understand the financial and strategic value of meetings. In other words, 'chats' become packaged solutions.

3

Increase client retention

Every client meeting is a chance to draw a direct line between the work that you do and your client's goals. These meaningful conversations enhance client engagement and retention.

4

Win new business

Meetings provide a great opportunity to capture client success stories and ask for referrals – helping you build your sales pipeline, attract new clients and boost revenue.

5

Avoid potential complaints

When all meetings are properly documented, you have a supporting 'audit trail' of discussions and outcomes, should there be a query about verbal advice or a misunderstanding over what action was agreed with the client.

Better team meetings...

6

Make smarter business decisions

Firms are facing critical decisions that will impact their future. Should we have remote teams? What services do we need to offer? Which technology and training to invest in? These decisions are best informed by structured group discussions.

7

Propel strategy execution

Team meetings should reinforce the company's strategic goals, and encourage debate on how to turn strategy into action. After all, people are more likely to execute something they've had a say in.

8

De-risk the practice

By holding regular meetings around key topics, such as cybersecurity, you can share best practice, improve knowledge and skills, and lower your operational risk.

9

Enhance employee engagement

Good meetings unite people around the company's goals. And when employees feel connected to core goals, particularly when those goals align with their personal values, they're more invested.

10

Build a stronger team

Meetings bring people together. It's that simple. Use them to celebrate successes (and failures), praise contributions, share personal stories, build trust and keep those vital connections alive.

People aren't the problem...systems are

Bad meetings aren't a people problem. They are always a system failure. By that we mean a lack of proper agendas, meeting rules and information metrics to monitor meeting success.

So if your meetings aren't delivering enough value for the business, ask yourself, 'Do we have a system in place to ensure every meeting counts?' If the answer is 'No', it's time to commit to better meetings.



Improving meetings doesn't involve huge changes or investment. In fact, it's a quick win – a fast, easy and cheap way to deliver a better service to clients and boost business performance. You just need the right system in place.

Unlock the power of meetings with Agendali

Designed specifically for accountancy firms, Agendali's revolutionary meeting software provides a complete framework for improved meetings, including template agendas and performance metrics to measure success.



Take the first step towards better meetings; join the Agendali waiting list for a free software trial.

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