

Key insights



Practice growth

- Bev Flanagan stresses the importance of getting away from your hourly rate: think about it in terms of what you're saving the client or what value you're bringing them.
- Not charging properly stunts your growth and you get the wrong clients.
- Charging properly is down to mindset, as you might feel bad about charging having not done 'much time' on a task. This needs to be reframed.
- Know where you want to get to and find those clients who also know where they want to go so you can help them get there. Price on growth and worth, not the time or effort.
- The mindset for growth is what will help you take your business forwards in 2026.



Making Tax Digital for Income Tax

- As of CCH Connections, only 129 days to go until MTD is implemented!
- Regular check ins and up-to-date data will set you up for an easy transition into MTD.
- It's suggested that you should segment your customers and see who is affected and when, then tailor your approach based on these groups.
- MTD is an outcome. The challenge will be the change management, new workflows and the journey itself. In this process, don't neglect those Self Assessment clients.
- If staff resistance is high, client resistance is high too. You need to explain the change in the right way to get the staff on board. Once they're working with the clients then everyone's genuinely happier.
- Penalties will be implemented in the first year as there is no soft launch. These will be based on late submissions, not the contents of the return.
- HMRC say you don't need to wait until next year to register your clients—better to know now if something isn't working!
- They also recently published guidance on non-digitalised clients. You can now go online and [apply for digital exemption](#).



Artificial intelligence

- If you're not using AI, start by looking at what you're using already, and see what AI is integrated into there or how you can easily deploy it. For example, if you're on Microsoft then you can start with Copilot easily.
- Encouraging staff to use AI in their own life might give them ideas about how to bring that into their workflows.
- Charles Richards, Head of Digital Client Service at Azets, recommends thinking about three lenses when using AI:
 - **Speed: doing things faster and removing painful manual tasks.**
 - **Driving revenue (tricky, but can be done).**
 - **Improving the client experience.**
- Training and safety awareness are key steps taken to use AI properly. It was noted that sometimes clients will push back saying that AI has told them otherwise on a topic, which is a difficult issue to deal with. You need to position yourself as a trusted adviser, otherwise your clients will look to AI for the 'answer'.
- Many accountants are already using AI for tasks such as summarising data, preparing first responses to clients, or looking at drafts of tax returns. You can also use it in management, such as minute taking, to-do lists, and workflow management.



Talent and skills

- Flexibility plays a major role in retaining your talent. Hybrid enables your team to focus and have a life outside of work, while getting that in-person time creates connection. Finding the right technology to enable your flexible working is key.
- Having the right systems in place, whether AI or automation, helps bridge the gap between juniors and partners. Juniors don't want to join a firm and be doing boring work.
- Plus, as more and more junior work can be done with AI, you'll need to ensure they still have the foundational skills to sense check the AI and learn around it.

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Advisory

- Clients have very high expectations in 2025, as they want things instantly. But accountants can't keep up and scale with this, and end up doing things for free instead. So how do you properly manage expectation and price your services?
- Start by asking yourself how much value you're delivering, even if the task only takes two minutes. You could be saving clients a lot of time, stress, and tax.
- Amanda C. Watts says that you must have money conversations with your clients (such as pensions) then have strategy conversation, and future conversation: where do you want to be?
- Doing more advisory means shifting outside of your comfort zone. Accountants have the power to get people together in a room and level up business owners.
- Your positioning should be based on your branding, niching, and messaging.
- It's all about mindset: you need to believe in yourself to get the right branding and pricing that you deserve.

Extra information

Looking for more? Check out these useful resources.



- eBook: [How to develop a successful MTD strategy.](#)
- Report: [How are accountants responding to MTD for Income Tax?](#)
- Blog: [What is the ECCTA and what does it mean for accountants?](#)
- eBook: [How small accounting practices can build a growth strategy.](#)
- Blog: [The future of cloud accounting.](#)
- Guide: [Turn your practice into an advisory in five steps.](#)
- Whitepaper: [Protect your business with ease.](#)
- Blog: [Answering your MTD for Income Tax FAQs.](#)
- [MTD resource hub.](#)