

Case Study

JAMES TODD & Co Case Study



“Business Coaching takes Chartered Accountant to new heights”

James Todd & Co is a very long established firm of Chartered Accountants in Chichester with a team of 13 including 3 partners. The practice has been providing accountancy, audit and taxation services to primarily small and medium sized family owned businesses.

“Businesses grow or they retract, they never stand still,” says Michelle Daniels, a partner in the Practice. “We knew that it was time for a change in direction to develop the practice however I didn’t know how. I was trained as a Chartered Accountant, I had never been trained in HR or Marketing. Team morale was at an all time low. I was finding the increasing team problems very time consuming and very stressful. Coming to work just wasn’t fun any more.”

Michelle was introduced to her ActionCOACH by one of her clients and hasn’t looked back. “The first step was a personal and business alignment; aligning where you are with where you want to be” says Michelle. The cost was partly covered by government funding, however Michelle says that even if she had had to fund it herself completely it would have been the best money she had ever spent.

“We now have a clear 5 year business and financial plan. We know exactly what services we want our Practice to provide, to which target customers and by when. We have a clear vision and purpose, and a set of values that our team are completely committed to. I have learnt how to lead our team, our team are highly motivated and communicate well,” says Michelle.

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Everyone now has clearly defined roles and Michelle has been able to delegate the appropriate tasks to free up time to work on the Practice, rather than in it – a major concept in the Action Coach’s programme. “I can now concentrate on the areas that will add value and profit to our Practice,” says Michelle.

James Todd & Co are really proud of the services that they can now offer and with their ActionCOACH’s help they have rebranded and are marketing these in a variety of ways. “As accountants we can become very blinkered, and the coaching has really opened our eyes to the opportunities there are to increase our Practice’s profitability,” says Michelle. Together with all the work the team have done to improve delivery and service, the Practice is now reaping the rewards. Turnover has increased by 10% and the practice expects to increase turnover by at least a further 5% in the next year.

“We are delighted with the skills we have developed and the results we have achieved with our ActionCOACH,” says Michelle. “The increase in profitability has covered the cost of the coaching several times over and I would recommend the coaching to anyone who is committed to running a successful, profitable business. In fact I already have made referrals to my coach and I am seeing the great results those businesses are also achieving.”

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