

## Our Values & Key Messages

- ✓ We do the right thing
- ✓ We invest in futures (our staff, our clients and our own)
- ✓ We aim to make a difference

## Our stakeholders

- ✓ Our Team
- ✓ Our Clients
- ✓ The Business

## Our Aims

- ✓ To be the only accountant you'll ever need
- ✓ To be the only employer you'll ever want
- ✓ To be successful!



## Business Ethos

We build deep and meaningful relationships built on trust, and always act fairly and with integrity.

We are open, honest, friendly and approachable in our relationships, and bring warmth / humour to those relationships.

We are passionate about our people. Each member of staff shares our values which in turn helps them to develop and progress through their chosen career path. We support diversity, opportunity, professional learning and personal development.

We are practical in our advice, always seek to go the extra mile, and are pro-active, dealing with things quickly and efficiently. We are creative and always look for ways of helping our clients.

We do all this in a commercial way, providing business and financial nous for our clients, and ensuring that our business is successful from a practical and financial viewpoint. Commercial success is what enables everything else.



## Values - what do they look like in real life?

### We do the right thing

Doing the right thing means sticking to your values and principles, no matter what. Often something might distract you from doing that, eg financial cost, personal interest, making life easier, avoiding a difficult situation.

#### Examples:

##### Doing the right thing – for staff

- ✓ Having a Bonus scheme to reward the team for their contribution, and striving to maximise this
- ✓ Having a system for continual progression, supported by 'competencies' in order to provide an engaging workplace and building self esteem
- ✓ Supporting another member of staff to help them overcome particular problems

##### Doing the right thing – for clients

- ✓ Answering their queries quickly and understanding their needs / satisfying them
- ✓ Looking for ways of improving family security through our complimentary businesses
- ✓ Supporting a long standing client in difficult times

##### Doing the right thing – for the business

- ✓ Identifying situations where clients are on the wrong billing structure, and working with them to update
- ✓ Instigating an ad-hoc meeting with a client to discuss their business and personal situations, with a view to generating added value work
- ✓ Delving into a client problem and finding a creative solution for them



## Values - what do they look like in real life?

### We invest in futures

It is important to us that staff can learn and develop, and achieve their potential. This generates positive self esteem which is of great importance. We also want our clients to succeed in business. We will invest in helping to achieve both of these things, which in turn, help the company to achieve success. It is also important for staff to feel 'engaged' in the whole process of building a successful company, and to feel that they are contributing to that.

#### Examples:

##### Invest in Futures – for staff

- ✓ Developing a clear competency structure
- ✓ Always being conscious of every staff member's progression and helping them achieve the next stage
- ✓ Regular 1-2-1's and staff update meetings

##### Invest in Futures – for clients

- ✓ Work with them to build the business for sale or to have a succession plan
- ✓ Understand what holds back a client and try to help
- ✓ Identify potential future cashflow problems and have early difficult conversations

##### Invest in futures – for the business

- ✓ Regular staff updates so everyone understands what is going on in the business
- ✓ Investing time to develop the complementary businesses, and involving our staff so they build a knowledge of these services, and new skills
- ✓ Developing this 5 year plan and publishing it for the benefit of everyone, enabling the whole team to pull in the same direction





## Values - what do they look like in real life?

### We aim to make a difference

We want to make a difference to the lives of our staff, for them to have fulfilling work and full support of partners and other staff. The same for clients – we want them to be successful, and feel that we have all contributed. We don't want to simply crunch the numbers. This means that we go the extra mile that someone else wouldn't because that extra mile is where the difference is made.

#### Examples:

##### Making a difference – for staff

- ✓ We rewarded a member of staff by allowing extra holiday to visit family
- ✓ We allowed a long sabbatical for someone who has had the dream of travelling the world
- ✓ We offer flexible working to allow returning mums to have great career prospects

##### Making a difference – for clients

- ✓ Donating to a charity client who was hit by a burglary
- ✓ Introducing potential new customers to a client
- ✓ Identifying opportunities for huge IHT savings

##### Making a difference – for the business

- ✓ Promoting positive aspects of the business on social media
- ✓ Promoting the business to people outside which could at some stage develop, eg other accountants, potential clients, other service providers
- ✓ Reception staff treating clients like royalty, making them feel valued and helping them enjoy their Elsby experience

