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Beating the queues

The name of accountancy's game is: 'capacity'

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Accountants' capacity crisis

Queues and bottlenecks are a constant for accountancy practices – beating these queues is more important than ever with MTD around the corner, suggests Vipul Sheth.

IS QUEUING A 'PROBLEM'? And... what does that have to do with accountancy? Bear with me.

There's a fun (or not so fun depending on your perspective) article in the [FT](#)* by Tim Harford on that most British of hobbies.

Harford makes the point that having too much capacity, reducing queues to a constant zero, is impractical in the real world. We can't all have a GP or bus at hand as and when required.

Keeping with public services, Harford then illustrates that bottlenecks are often interlinked; courts are struggling to deal with cases while prisons are full, of which a fifth of the prison population are awaiting trial. Once the bottlenecks are there, the queues get out of control – and won't simply disappear.

Strategic thinking is therefore required to find

a plan to deal with interlinked bottlenecks and, of course, some extra capacity where things have got out of hand.

BUILDING BOTTLENECKS

Accountancy practices are no strangers to capacity and resourcing issues or indeed bottlenecks. In fact, the fundamental operating model of a practice is built around it.

The work undertaken is driven by ebbs and flows created by the statutory filing requirements of tax, accounting and audit. And then, on a day-to-day basis, managing these ebbs and flows is complicated by staff illness, holidays, perhaps even clients sending in information much earlier (or later) than usual. There may even be a slew of 'too good to turn away' clients that join.

Work builds up, and pressure is created. Workflow management can help, but



legislative filing deadlines don't move. What other bottlenecks and problems are then created? There are many and varied that can be highlighted. Partners put their business development work on hold to check or even produce files. Meetings with existing clients are pushed back, loosening the bond you

* article paywalled



have with them or even missing out on a piece of work because the conversation didn't happen.

The staff you have depended on, that have fought fires for months, consider their career options.

Management then struggles to find the time to come up with a new long-term resourcing strategy, which means that bringing in extra capacity is usually short-term, expensive and sub-optimal.

BEAT THE QUEUES

I don't really want to pivot to an MTD rant. I would much rather focus on Advancetrack's ability to help practices manage their capacity requirements and become an integral part of their resourcing strategy. However, there are two huge tranches of micro businesses

"Practitioners' true value comes from supporting their clients through compliance and providing further advice and support during the business lifecycle"

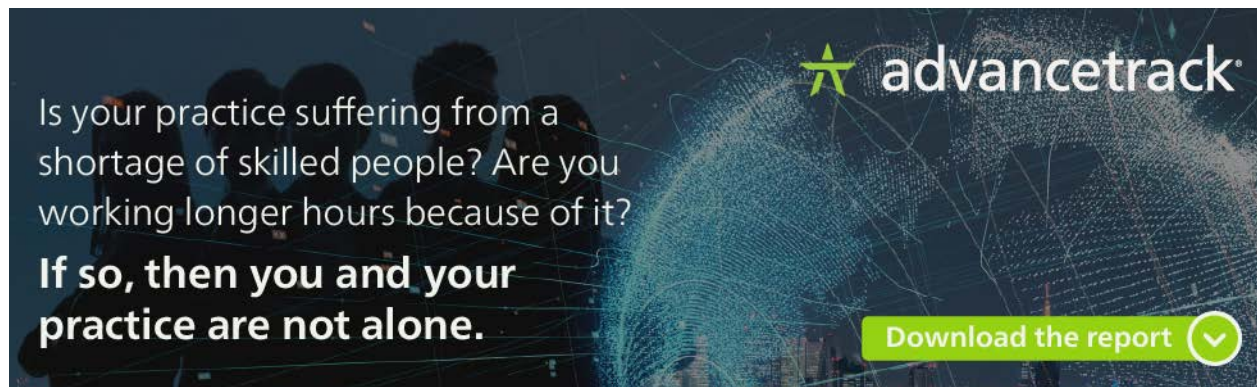
that will come under MTD's remit in 2026 and 2027; I have serious concerns that practices – large and small – are not grasping the nettle on what it means for client workflows and, more importantly, relationships.

Practitioners have a unique and envied relationship with their clients. It is understandable that not all the quarterly returns required of MTD and bookkeeping can be undertaken by the practice directly.

But, keeping clients at arms-length during the start of this process, which is something I hear is happening often, could prove self-fulfilling. First, accountants could find that the impact of this approach is lots of confused clients calling up and asking for help after the horse has bolted – creating further workflow bottlenecks and capacity issues.


Second, AI and automated tech will make the task of bookkeeping and filing easier for businesses and the public. But practitioners' true value comes from supporting their clients through compliance and providing further advice and support during the business lifecycle.


The 'bloke down the pub' is being replaced by AI searches; if accountants leave clients (literally) to their own devices then many will take the next step towards full self-service. Practices, sadly, may then find that the queues of work to be undertaken disappear. ■



Is your practice suffering from a shortage of skilled people? Are you working longer hours because of it?

If so, then you and your practice are not alone.

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Vipul Sheth is founder and managing director of Advancetrack



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In profile: Louise Walpole

Louise brings deep accountancy sector expertise into Advancetrack. With a clear focus on sustainable growth, Louise is set to help drive our expansion in the UK and internationally.

WHAT IS YOUR CURRENT ROLE?

I am Advancetrack's sales director – responsible for driving the continued growth of the business. We have a strong proposition here: a great service and successful clients with whom we have long-standing relationships. My aim is to drive that forward, not only in the UK but Australia and the US.

WHAT IS YOUR BACKGROUND?

I spent nine years at Money Penny as head of the Finance Sector, helping to implement telephone answering and live chat services across accountancy practices. Prior to that, I ran my own business, giving me first-hand experience of the pressures business owners face, the difficult decisions they make, and the inevitable highs and lows along the way.

I genuinely enjoy working with accountants; many are highly progressive, commercially minded and deeply committed to helping their own clients grow.

HOW DID YOU GET THE ROLE, AND HOW HAVE YOUR FIRST FEW WEEKS GONE?

I first met Advancetrack founder and MD Vipul Sheth around six years ago at industry events. The company's premium positioning and focus on quality strongly resonated with me. Our conversations were consistently aligned around doing what's right for the client and supporting sustainable growth.

Joining the business felt like a natural move into a fast-growing, entrepreneurial environment where I can make a meaningful impact and help shape its continued growth. In my first few weeks I've focused on enhancing what's already working, bringing fresh perspective and proven best practice. My aim is to provide the team with clear direction and focus as we continue to grow.

WHAT DOES SUCCESS IN YOUR ROLE, AND FOR ADVANCETRACK, LOOK LIKE?
Success means seeing clear, measurable



progress with both prospects and existing accountancy clients. Ultimately, trust is fundamental in outsourcing, so a key part of the role is reinforcing the importance of choosing the right partner.

By building long-term relationships that help practices serve their own clients more effectively, we create a strong platform for sustainable growth. ■





Simple, everyday, actions for a smoother 2026

Creating a smoother experience for the year ahead is best executed by designing well thought-out plans to ensure your firm is set up for success.

Accountants are known for meticulous calculation and accurate forecasting for their clients, and now it's time to turn those skills into making the next 12 months profitable and strategic for your own firm.

Some of the more obvious solutions would be to reconcile accounts in platforms like Xero every morning, or prioritise workplace organisation, but you may have heard of that before. With creativity and longevity in mind, we've compiled a list of some simple, everyday but essential considerations that you can implement now so your 2026 is promising and proactive.

LOOK TO AUTOMATE THE TOP THREE REPETITIVE TASKS

Embracing AI will be an inevitable priority moving forward in the accounting sphere.

The key is to find a way for automation to work for you and your clients that is both functional for administration and compliance, while maintaining a personalised approach to your professional partnerships. AI is great for completing everyday tasks that take up time and dilute your capacity to engage in profitable advisory services.

Assess the top three repetitive tasks that are completed every day and find out how much time this takes out of each day for you or your team. For example, set up AI notes for your Zoom or Teams calls, email composition and scheduling client meeting requests could assist in freeing up your schedule to put more effort into higher quality services for your clients.

REVIEW YOUR TECHNOLOGY STACK

Assess the current technology your firm is



using and see if there are more streamlined options with new software, or updates in existing software designed to make your work more efficient. Finding a more integrated pathway can boost efficiency and rid yourself of overloading on apps, software and tech that no longer serves a purpose.

Define your objectives first and foremost. Which technology best serves your goals and those of your clients. List all of your software and find out how they interact or if they don't and how you can combine technology for better usage. Evaluate the costs associated with using certain software and eliminate

underused technology that could exceed your budget. Look to the future and find out what new software would be best used for functionality and value.

SCHEDULE MONTHLY CHECK-INS WITH YOUR CLIENTS

A simple and everyday task that proves to be worth its weight in gold is to check in with your clients on a regular basis. Scheduling in a monthly check-up shows your interest in their experience and provides you with a chance to discuss their goals and how you can help.

A common phrase from clients is: "I didn't

know you offered that". Regularly marketing to existing clients means they know what you can help them with and they can then add additional services as and when needed. At the same time, a monthly check-in can provide an opportunity to catch things that aren't going well so you can fix any issues before it's too late.

Turn compliance conversations into business advisory opportunities and moments to assess your client's overall experience. Have a chat with them to seek feedback about your firm's processes and engage proactively to complete a health-check of their business.

By incorporating this meeting into your schedule throughout the year, you will gain valuable insight into your client's aspirations and where they could use your assistance.

The key to securing business advisory work with your client is to get to know them and their business inside and out, inserting your expertise when needed and tangibly showing them how engaging in these services can uplift their professional strategy.

REVIEW PRICING EVERY QUARTER
You might price review annually; however, a more modern approach is to conduct a

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quarterly conversation around the offerings you provide to your clients and how you can assess to reflect the quality of your services. Encourage your client to think of this as what you are offering them and how this helps their business, rather than having the focus be on higher pricing. There are many models you can adopt to evaluate the best structure for your firm, but here are some tips from us on how to begin:

- Calculate your overhead costs, price margins and forecasted profits for the year ahead
- Judge your client's sensitivity to pricing changes and what they value. This could be a great opportunity to include any new offerings like business advisory services in any pricing announcements to make for a smoother transition
- Check out your competitors. Identify gaps in their pricing, assess their structure including subscription or bundle models and be sure not to undersell your own services

- Implement a new pricing structure with transparency and clear communication to your clients about why this has changed and how you plan to make it worthwhile.

Upskill your team in conversational and questioning skills.

If business advisory services are an element you want to add to your resources in 2026, you will need to focus on upskilling your team's conversational and questioning skills.

One of the primary elements when starting the business advisory journey with a client is the ability to hold an engaging conversation and being able to ask the 'right' questions to get key information you need in order to advise.

Some simple, everyday tasks you can implement to upskill your team's conversational capabilities are:

- Provide practical opportunities for your

staff to engage with clients either by phone, in person or on video call

- Encourage team members to take on mentorship roles and peer-to-peer learning
- Role play business advisory meetings and ask your team to submit five questions they would ask to get your clients talking
- Practice active listening and workshop follow up questions. For example, if your client mentions they are looking to expand their business locations, ask them how they plan to work this into their budget and business strategy. Open questions get open answers.

With the goal to make the next year as smooth as possible, implementing these simple tasks can leave you with valuable time that can be used to improve client relationships, action high-profit services like business advisory, upskill your team, and ensure your firm is functioning to the best of its ability in 2026. ■



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