Chapter 15

The Toolkit

This is where the book stops being something you read and becomes something you do. Copy these pages, fill them in, keep them beside you while you work.

A. The Five-Client Checklist

- ☐ My one-sentence offer is written and tested on a friend (Chapter 3)
- ☐ My Starter, Standard and catch-up packages and fees are set
- ☐ My hundred-name list is written: 40 warm, 30 local, 10 accountants, 20 online
- ☐ My warm-circle message has gone to every name, one person at a time
- ☐ I've approached local businesses, starting with those that know my face
- ☐ I've introduced myself to at least five accountants
- ☐ I've joined local business groups and answered questions helpfully
- ☐ Every contact is in my tracker, with a follow-up date
- ☐ I've held twenty-minute conversations and sent proposals within 24 hours
- ☐ I've followed up every soft no on the day I promised
- ☐ Each new client has a signed agreement and a welcome message
- ☐ Five clients signed

B. The Hundred-Name List

Write fast. Don't judge. Every name is a doorway to everyone that person knows (Chapter 4).

Warm 1–25	Warm 26–40, then accountants A1–A10	Local 1–25	Local 26–30, then online O1–O20
1.	26.	1.	26.
2.	27.	2.	27.
3.	28.	3.	28.
4.	29.	4.	29.
5.	30.	5.	30.
6.	31.	6.	O1.
7.	32.	7.	O2.
8.	33.	8.	O3.
9.	34.	9.	O4.
10.	35.	10.	O5.
11.	36.	11.	O6.
12.	37.	12.	O7.
13.	38.	13.	O8.
14.	39.	14.	O9.
15.	40.	15.	O10.
16.	A1.	16.	O11.
17.	A2.	17.	O12.
18.	A3.	18.	O13.
19.	A4.	19.	O14.
20.	A5.	20.	O15.
21.	A6.	21.	O16.
22.	A7.	22.	O17.
23.	A8.	23.	O18.
24.	A9.	24.	O19.
25.	A10.	25.	O20.

C. The Script Finder

No.	Script	Use it when	Page
1	Your warm circle	Telling people you know that you're open	16
2	A local business that knows you	Asking in person at a quiet moment	19
3	A local business you don't know	Leaving a note or letter	19
4	Introducing yourself to an accountant	First email to a local practice	22
5	Thanking an accountant	Within a day of a referral	22
6	After answering in an online group	Once you've genuinely helped	24
7	The twenty-second introduction	"So, what do you do?"	25
8	Booking the call	Someone replies "tell me more"	25
9	The single gentle follow-up	A first message went unanswered	26
10	Reflect and offer	Minute ten of the conversation	30
11	Naming your fee	Then stop talking	30
12	Agreeing the next step	They're leaning toward yes	31
13	"I'll think about it"	Attaching a date to a hesitation	32
14	"It's more than I expected"	Offering a smaller door in	33
15	"I need to check with someone"	Supporting a shared decision	33
16	The dated follow-up	On the day you promised	34
17	When they ask for a lower price	Change the scope, not the value	36
18	The welcome message	Within the hour of a yes	38
19	The referral ask	After a month or two of good work	39
20–24	Five more hesitations	See Tool E	50
25	Sending the proposal	Within 24 hours of the call	51

D. The Conversation Notes Sheet

Fill one in during every twenty-minute call. Copy the page as many times as you need.

Name, business, date

How they handle the books now

Software and bank accounts

Roughly how many transactions a month

Their biggest frustration (in their words)

What happens at tax time

What "off my plate" would mean to them

Package suggested and fee named

Their response

Next step and date

E. Five More Hesitations

Scripts 13 to 15 in Chapter 10 handle the three you will hear most. These are the next five, each answered calmly and with an easy next step.

No.	They say	You say
20	"I already have someone."	"That's great, it sounds like you're in good hands. If anything ever changes, or you'd like a second pair of eyes before year-end, I'd be glad to help."
21	"My accountant does all that."	"Many accountants prefer the monthly work done by a bookkeeper, so they can focus on year-end. If it would help, I'm happy to speak with them about how we could share it."
22	"I just do it myself. It's not that bad."	"You clearly know your numbers. Can I ask how many evenings a month it takes? Some owners find that time is worth more spent on the business than on the books."
23	"Can you send me some information?"	"Of course. So I send the right thing, may I ask two quick questions about how you handle it now? Then I'll email a one-page summary today."
24	"Now's not a good time."	"Completely understood. When would be better to pick this up, after your busy season? I'll make a note and get in touch then."

F. The Agreement Checklist

Your written agreement doesn't need to be long. It does need to cover these points. Have a local professional review your template once; this list is not legal advice.

- ☐ Both parties' names and the start date
- ☐ The services included, described plainly
- ☐ What is excluded, and who handles it
- ☐ The fee, when it is invoiced and when it is due
- ☐ What the client must provide, and by when
- ☐ How you will keep their information confidential and secure
- ☐ How either side can end the arrangement, and the notice period
- ☐ Signatures and dates

G. The One-Page Proposal

Keep it to one page. Send it within 24 hours, while the relief is still fresh.

Prepared for	[Client name, business], [date]
What I heard	[Their problem, in their own words, in two or three lines]
What I'll do each month	[Your package: e.g. categorize all transactions, reconcile bank accounts, send a one-page summary by the 10th]
What's not included	[e.g. tax returns and tax advice, which stay with your accountant]
What I need from you	[e.g. receipts photographed weekly; user access to your accounting software]
Fee	[Amount] a month, invoiced on the 1st
Start date	[Date]
Next step	Reply "yes" and I'll send the agreement to sign

SCRIPT 25 · SENDING THE PROPOSAL

"Hi [name], thank you for your time today. As promised, here's a one-page summary of what we discussed and how I'd help. If it looks right, just reply 'yes' and I'll send the agreement. I'll check in on [day] either way."

H. The First-Week Onboarding Checklist

- ☐ Welcome message sent within the hour (Script 18)
- ☐ Agreement signed and filed
- ☐ Invited as a user to their accounting software (no shared passwords)
- ☐ Bank feeds or statements arranged
- ☐ Receipt routine agreed (how, and how often)
- ☐ Communication rhythm agreed, and the monthly date they'll hear from you
- ☐ First deliverable date set, within the first fortnight
- ☐ Calendar reminders created for every recurring task
- ☐ Client added to your client-care check-in

I. The Weekly Scoreboard

Ten minutes every Friday. Compare each stage with the planning figures in Chapter 13, and put next week's effort where the numbers drop.

Week	Touches	Replies	Calls	Proposals	Signed	Next week's focus
1						
2						
3						
4						
5						
6						
Sprint plan	**100**	**~25**	**~12**	**~6**	**3–5**	

J. The Client Tracker

One row for every person you contact. Working this page is what separates people who get five clients from people who get one and lose track.

Source: W = warm, L = local, A = accountant, O = online, R = referral. *Stage:* contacted, replied, call booked, proposal sent, signed, not now.

Here are a few rows from Leah's tracker at the end of her second week. Notice that every open row has a date and a next step; nothing is left to memory.

Name	Business	Source	First contact	Reply?	Follow-up date	Stage	Next step
Sam	(her brother)	W	Day 4	Yes	—	Referred Tom	Say thank you
Tom	Landscaping	R	Day 6	Yes	—	Signed	Send first summary
Ruth Okafor	Accountant	A	Day 8	Yes	—	Met Thursday	Thank-you note
Corner bakery	Bakery	L	Day 8	No	Day 15	Contacted	Script 9
Dev	Hartley's café	L	Day 9	Yes	Day 11	Call booked	Notes sheet ready
Nadia	Florist	O	Day 10	Yes	Day 15	Replied	Script 8
Mike	Electrician	R	Day 12	Yes	Day 14	Call booked	Ask about the backlog
Jess	Dog grooming	R	Day 12	No	Day 19	Contacted	Script 9

Name	Business	Source	First contact	Reply?	Follow-up date	Stage	Next step