

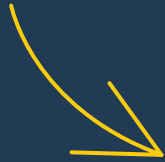


LINFORD
GREY

Talking practice efficiency with Linford Grey

“I have a vision for my practice
— and Xero is helping me achieve it”

Get started with Xero



Introduction: Linford Grey



Adam Pritchard

Founder and Managing Director
Linford Grey



For a practice that only started life five years ago, Leicestershire's [Linford Grey](#) has already emerged as an industry leader. The winner of the 2021 Total Xero Award — given to a firm demonstrating outstanding vision and ambition — Linford Grey embraces technology to empower their practice and deliver fantastic results for clients.

Founder and Managing Director Adam Pritchard previously worked for an accounting partnership in London. “I would walk around different parts of central London visiting clients, doing data entry, bookkeeping and management reporting,” he says. “Most of those guys were on desktop software and it was a nightmare. I couldn’t get the same report twice out of the systems and found it incredibly difficult to use. The tools that we were using were obstacles.”

Adam had one client who was embracing technology in his business and he saw the difference it was making.

“He was in Xero and he was making incredible use of Google Drive. I just thought: he’s nailed it.”

So when Adam decided to make the leap and set up on his own, his vision was a practice that looked and felt more like a fintech company — an advisory-led firm that harnessed the power of technology to help clients achieve their goals. “I moved back to Leicestershire, rented a barn at the back of a farm near where I was living and branded up Linford Grey,” he says. “That was 2018 and we’ve been on that journey ever since.”

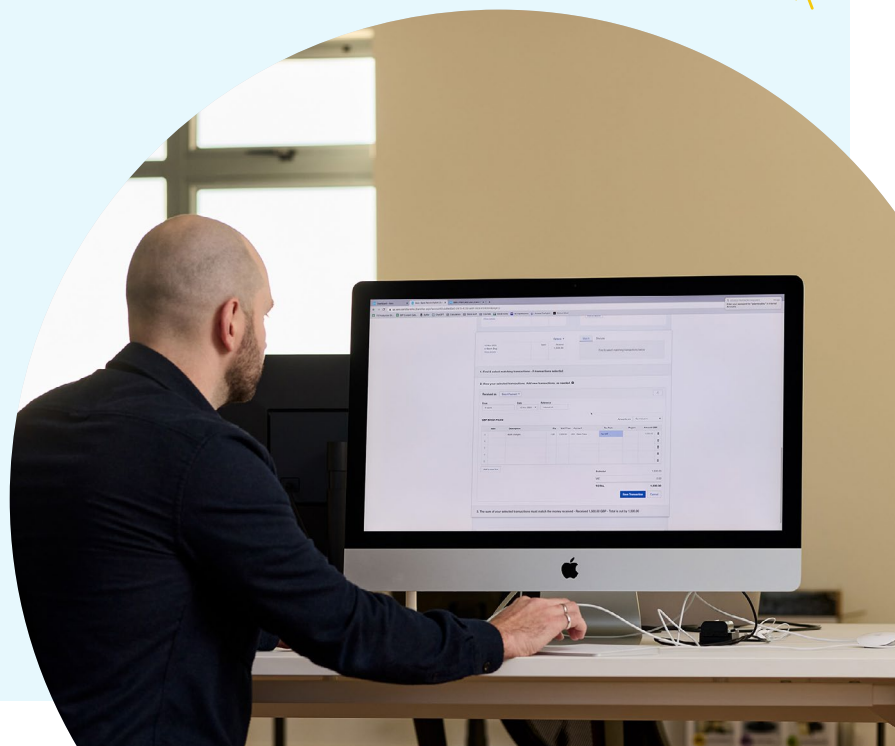
Leveraging technology to add value

Linford Grey set about creating a tech stack that would both help them work as efficiently as possible and provide as much value as they could to clients.

“What we are aiming to achieve when we adopt technologies is a competitive advantage,” says Adam. “When picking new products we ask: Is it going to improve the quality, the efficiency, the rate at which we can scale our service? Is it going to make things simpler for our clients? Is it going to reveal something they didn’t know before, help them access funding or offer some other insight on the business?”

At the core of their ecosystem is Xero’s cloud accounting software. “Xero was always going to be what I call our single source of truth,” says Adam. “From then it was an easy move into live bank feeds, payroll, CIS, expenses, Xero Me, Hubdoc and all of those add-ons. The reason that we invest in Xero over other software providers is I can trust the roadmap. I know that if it isn’t available now, it’s going to be available in the next few months. And if it’s not quite right yet, it’s going to be there in the next few months.

That’s very reassuring. You can sit back and know that Xero is going to deliver it.”



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Through word of mouth and networking, Linford Grey steadily built up a client base all across the country, servicing niches in the hospitality and e-commerce sectors, as well as the wider SME and startup market. Adam looked for like-minded businesses who shared his enthusiasm for technology.

“I was very specific about the vision,” says Adam.

“I wasn’t going to work on desktop solutions. If you were coming on at Linford Grey, you had to be a Xero client.”



Helping clients onboard and remain connected

While clients need to be open-minded about technology, Linford Grey provides plenty of support to educate businesses and get them up to speed.

“When you come to us, if you’re on Sage, no problem. If you’re on QuickBooks, no problem,” says Adam. “We’ll take you off, we’ll bring in all of your historical data using Movemybooks and it will take no more than 24 hours. We’ll set up your bank feeds, we’ll set you up with data capture software Hubdoc. We do four onboarding calls where we learn about a client’s business and operations.”

For their onboarding process, Linford Grey uses [Ignition](#), a software solution that integrates seamlessly with Xero to automate proposals, client agreements, billing and workflows. *“From there we set up the automated workflows to happen every year, every quarter, every month, every week,”* says Adam. *“The next thing is Xero Payroll, Hubdoc, live bank feeds and any other functionality like CIS. We’ll have a conversation with the client and ask what their operations look like. For hospitality clients, we’ll ask about their response system and how they’re taking payments. For e-commerce platforms we’ll set them up on [A2-X](#) to reconcile their transactions in Xero.”*

Xero seamlessly integrates with a huge amount of third-party software and apps. To help manage their workflows, Linford Grey uses the practice management tool [Karbon](#). *“We track time in Karbon, so we can understand on a month-to-month basis across all the service levels that we’re offering if that client is profitable,”* says Adam.

Linford Grey is always looking for ways to improve communication with clients, making sure to balance the convenience of technology with the human touch.

“When we’ve researched the pain points of small businesses, one of the common ones is accountants not getting back in good time,” says Adam. **“So we track our response times and make sure that across the practice we give meaningful responses within 24 hours.”**

They also shoot videos to send to clients alongside queries and reports. *“Clients get a 15-minute brief of what it means for them, rather than having to go to their office and explain the report. If they’ve got follow-up questions, we book a conference call. So we’re using the technology as touch points and the client, I hope, feels the love.”*





Time to plan for the future

Linford Grey's employees, many of who joined the practice from a more traditional accounting background, are happy too.

"Their feedback is they're not overworked, everything's manageable and it's a very communicative environment," says Adam.

For all they've achieved so far, Adam is always looking at new ways technology can make the practice more efficient and add value for clients. *"Over the last 3 to 4 months, my deliverable workload in the practice has probably dropped by two-thirds," he says. "That's not because I'm wonderful and doing it all on my own. That's because I've had input from very helpful people who are further along on that journey than I am."*

Because he isn't tied up with day-to-day workflows and processes, he can concentrate on growing the practice.

"That's the real benefit of technology," he says. "I'm focused on the strategy of how I move Linford Grey forward over the next two, five, even ten years, and less focused on how I need to get that management report out."

Harnessing the power of technology means more time spent on the important things, whether that's inside or outside of the workplace. *"I have a vision for the practice and I have a vision for my life, and it doesn't involve complicated desktop systems and visiting other people's premises to give them outputs that are six weeks out of date," says Adam.*

"Clients want a simple tool. They want meaningful insights and they want it in as frictionless a way as possible. So that's our goal."



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innovative practice tools, thriving community,
and on hand accounting experts help increase
efficiency so you can do more**

