Put Clients First, Always!

- Be supportive, approachable and encouraging with every client.
- Educate yourself on each new client: know their profile and their future plans.
- Lead by example: show what putting clients first looks like.

Communicate Like a Pro

- Respond to clients in a reasonable time frame.
- Manage expectations and listen carefully to what is being communicated.
- Give new joiners as much information as possible, including clear do's and don'ts.

Build Bonds, Not Just Business

- Build strong client relationships by understanding their personal interests, sharing experiences and maintaining regular contact.
- Keep up regular check-ins.
- Understand our leaders' visions and expectations.
- Make every new joiner feel welcome, supported and part of the team.

Know Thy Client Inside Out

- Expand your knowledge at onboarding, then keep it fresh with frequent check-ins.
- Share what you learn: involve the team, document it and keep permanent file info.
- Build relationships across the team by introducing clients to key people and ensuring new joiners have the background and history they need.

Know the Business, Master the Tax, Advise with wisdom

- Stay up to date with business and tax developments, and be the expert clients can rely on.
- Share knowledge, collaborate, support colleagues and delegate effectively.
- Invest in people through structured induction, ongoing training and professional development.
- Leaders keep teams informed, stay engaged and lead by example.

mac 10 PRINCIPLES

Deliver Reports with Pizzazz

- Make a great first impression: on-brand, consistent and using our templates.
- Keep it concise and no-waffle: relevant, insightful and commercial, with a succinct executive summary (the TLDR).
- Make it easy for leaders to decide: clear visibility, a matrix of actions and responsibilities, and a clear "why am I reading this?"

Embrace Continuous Improvement

- Check that our service meets clients' needs and supports their future business goals. Identify risk areas and give value -added advice.
- Review jobs, identify bottlenecks, improve execution and learn from mistakes.
- Support people's development through proper training, regular feedback and reviews, and by listening and acting on suggestions.

Learn from Every Goodbye

- Understand why clients leave and use their feedback to identify where we could have done better.
- Keep clients informed and valued through changes, and maintain regular communication throughout the relationship.
- Learn from lost clients by improving our service, offering cost-effective solutions, meeting deadlines and giving our teams the support and resources they need.

Tackle Constraints Head-on

- Be solutions-driven, with a "can do" attitude and an enquiring mind.
- Be honest with clients and leaders about constraints. Communicate and collaborate, plan ahead, and under-promise and over-deliver.
- Be patient and understanding with colleagues, challenge and guide each other, and welcome joiners with assistance, guidance and mentoring.

Uphold Courteous Professionalism

- Be consistent, honest and transparent with clients, every time.
- Show up smart and presentable, and get the basics right: AML and engagement letters.
- Take AML and compliance seriously, speak up (whistleblowing) and be consistent about honesty in every forum.
- Protect our reputation and sustainability so we stay investible and leaders can "sleep at night". A good reputation brings talent and referrals.