



The 3 Decisions Keeping Your Accounting Firm from Pricing What It's Worth

A practical guide to structuring services, pricing with data, and making advisory work repeatable.



Most firms are built around compliance first — think tax prep, bookkeeping, and the work people picture when they hear "accounting." Everything else typically gets absorbed informally as clients need it.

That's exactly why so many firm owners finish tax season knowing they worked more than they earned. It almost always traces back to three things: how services are structured, how pricing gets set, and whether advisory work has any process behind it (or just lives in your head).

These three shifts change that.

Shift 1	Shift 2	Shift 3
Clearly structure your services	Price with data (not guesswork)	Make advisory work repeatable

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SHIFT 1

Clearly Structure Your Services

What Usually Breaks Down

Think about how you explain your services to a new client. Chances are, it's hard because your services grew gradually, client by client, situation by situation. Every time someone needed something new and you delivered it, that became part of what you do, bundled under one vague idea of “accounting.” Eventually, your service list became this sprawling, living thing with no clear boundaries around it.

Pull the work apart and it usually breaks into five levels:

Service Level	When to Offer	What It Includes	What to Watch For
01 Cleanup Services	Back taxes, disorganized books, late filings, months of uncategorized transactions.	Back-tax filings, bookkeeping catch-up, payroll correction, entity cleanup.	A one-time project that gets a client current, then rolls into a recurring package.
02 Setup Services	New business, new entity, investment property, or any life change needing new structures.	EIN, S-corp election, accounting setup, payroll setup, estate planning coordination.	Clients don't ask for this by name. You have to spot it and offer it.
03 Compliance Management	Every client. Review annually and adjust as their situation changes.	Tax prep, bookkeeping, payroll, sales tax — the historical work that keeps clients current.	Where the majority of fees live. Levels 4 and 5 are frequently delivered here at no extra charge.
04 Tax Advisory	Pre-filing, post-filing, after a surprise tax bill, before year-end — multiple times a year.	Proactive tax planning, strategy sessions, estimated tax reviews, what-if scenarios.	Clients are already asking for this. They don't have a package to say yes to.
05 Strategic Advisory & CFO	Business financing, expansion, cash flow stress, “quick questions” that run two hours.	Cash flow planning, business strategy, financial modeling, acquisition or exit support.	When this is happening informally, scope creep is the symptom. A formal package is the fix.

The work that gets a fee attached to it is almost always Level 3 because compliance work is concrete enough to define. Everything above it — the tax planning conversation, the two-hour call about whether a client should buy out their business partner, the back-and-forth around cash flow during a growth push — gets delivered anyway but never becomes part of the engagement. That's scope creep.

It usually starts when you answer a client's "quick question." You make the judgment call: it's faster to answer than to explain why it falls outside the scope. Do that enough times and the client learns they can keep asking — each question bursting through the scope until the relationship looks nothing like the one you originally priced.

That's how advisory work ends up scattered across meetings, review calls, and email threads that unspool for weeks. Nobody planned it that way. Your firm just kept absorbing it, one interaction at a time.

How to Make the Shift

You're most likely delivering Levels 4 and 5 without getting paid for it. Tiered packages turn all that invisible work into something you can scope.

Create three levels of support. A client trying to sell a business in three years needs something different than one who just wants to avoid a surprise tax bill. The tiers give you a way to reflect that without rebuilding the conversation from scratch every time.

Tier 1

Compliance covers the historical work: tax prep, bookkeeping, payroll, and any cleanup or setup the client needs. This is what most clients start with.

Tier 2

Advisory layers in planning: strategy sessions, estimated tax reviews, year-end planning, and the guidance that keeps clients from being surprised at filing.

Tier 3

Strategic goes deeper: cash flow planning, business decisions, financial modeling, and the ongoing relationship that looks more like a CFO than a preparer.

Present them to every client at intake and every annual review. Someone who was compliance-only two years ago may now own property, have employees, or be considering an acquisition. If you never put a higher level of support in front of them, they never get the chance to say yes. How the tiers are framed also shapes onboarding, document collection, and scope expectations before the work even begins.

SHIFT 2

Price with Data (Not Guesswork)

What Usually Breaks Down

A prospect explains their situation, you ask a few questions, and eventually they ask: "Well, what do you charge?" You don't have the full picture yet, but you don't want to kill the momentum with "I'll have to get back to you on that." So you pull a number from memory based on what similar clients pay, or simply the highest number that feels safe to say out loud.

That number becomes the anchor. Everything that comes in after — a new entity nobody mentioned, estimated payment questions, planning conversations that quietly turn ongoing — gets squeezed inside it. Finishing the work feels easier than having to reset the fee.

Long-term relationships are where it gets hardest to address. The work expands gradually enough that nobody ever stops to fully reprice it. Or you've worked with someone for ten years at a lower price, and resetting the fee feels awkward — you don't want to shock a loyal client with a sudden jump.

Meanwhile overhead keeps climbing whether pricing does or not: software, payroll, responsiveness, turnaround expectations. Eventually you're carrying a much heavier relationship than the invoice reflects.

The Dormant Revenue Math

300-client practice:

- × 20% upgrade rate (conservative)
- × \$500 average upgrade

= \$30,000 in your existing client base

And that's the conservative version.

When Pricing is Right

Clients stop negotiating because they're choosing from a menu instead of reacting to a single number. The clients who want more find it since the options are clearly in front of them. Churn drops because the engagement keeps pace with what clients need year to year. And when scope is defined before work starts, payment collection is straightforward — no ambiguity about what was agreed to or awkward conversation about work that wasn't in the original fee.



How to Make the Shift

1 Set a minimum fee and hold it.

Current market for a basic tax engagement runs \$450 to \$1,250 a year. Add ongoing accounting and support and that range moves to \$500 to \$2,500 a month. If you're consistently below either of those, the pricing conversation is the wrong place to start — most firms keep their pricing flat simply because nobody ever stopped to check what the market was actually doing.

2 Scope first, price second.

The reason pricing feels like a guessing game on most intake calls is that the number comes out while both sides are still figuring out what the engagement covers. Before you quote anything, run a real discovery conversation. Ask what changed this year, what they're trying to accomplish, and what they've been meaning to get help with. The fee comes at the end of that conversation, so it's a conclusion, not something to negotiate.

3 Pull your client list sorted highest to lowest fee.

You'll find a point where fees drop below what the work costs to deliver, mostly with clients priced years ago whose pricing never evolved as the relationship did. That group tends to be where the fastest revenue gains are sitting. They're already in your book, just underpriced.

SHIFT 3

Make Advisory Work Repeatable

What Usually Breaks Down

Advisory is already happening in your firm. You're just not always getting paid for it. It's in the calls that come in after a hard quarter, the review meeting that was supposed to be 30 minutes and turned into 90, and the email that opens with "quick question" and turns into a full planning conversation. Clients bring these conversations to you because they trust you, and because once they realize you understand their business, they stop thinking of you as someone who *just* prepares returns.

This is a Structural Problem

The issue isn't that clients want more from you. It's that everything they want has to come from you specifically, because there's no process for anyone else to follow. That works fine until the volume gets heavy, you're out for a week, or you try to hand off a relationship to someone on your staff and realize there's nothing to actually hand off because everything — the knowledge, relationship, the whole thing — lives in your head.

It got this way because advisory was never designed into the firm — it just accumulated. Compliance had structure around it from day one: deadlines, deliverables, a workflow that told everyone what came next. Advisory never got that. It arrived the way scope creep always does: one small exception at a time. By the time you notice how far the relationship has expanded past what anyone originally agreed to, it's been that way long enough that resetting it feels harder than just continuing.

Without an Advisory Process

Every advisory conversation runs through you — no exceptions.

When you're out, clients wait. When you're burned out, the work stops.

Handing off a client relationship means explaining years of undocumented history.

When it comes time to sell, buyers realize the knowledge walks out the door with you.

With an Advisory Process

Your team can handle a planning question without it waiting in your queue.

When you're out, the process keeps running. Clients don't notice you're gone.

Handing off a relationship means sharing a documented process someone else can follow.

When it comes time to sell, buyers see a system they can evaluate, price, and run without you.

How to Make the Shift

Start by naming what you offer and putting packages around it. That's what turns informal advisory into something that can be scoped, priced, and signed before the work starts.

From there, get the process out of your head and onto paper. A simple four-step framework works:

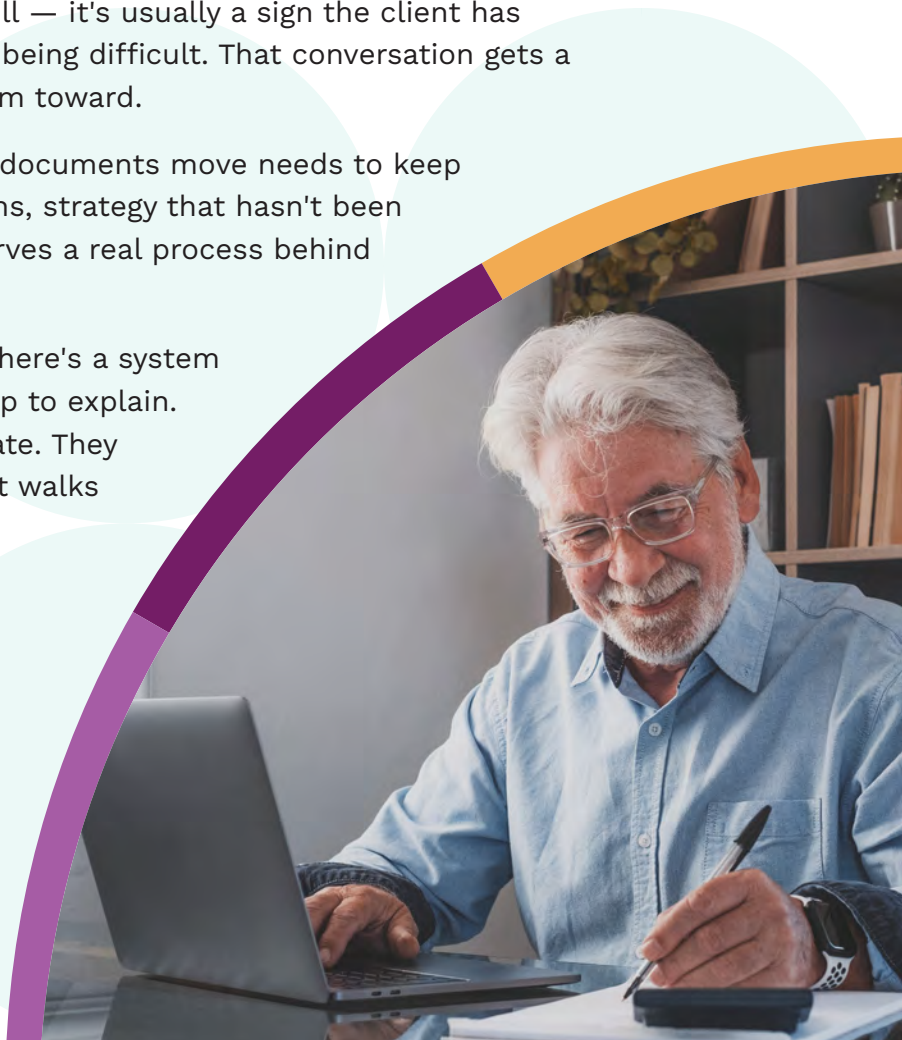
- 1. Establish a baseline.** What does this client need this year, and what are they expecting from the relationship? Get it on record before the work begins.
- 2. Run the analysis.** What are their tax exposure points, business changes, and financial risks? This is where your expertise earns the fee.
- 3. Identify priorities.** What are the two or three things worth acting on before year-end? Not everything. Focus on the most important things.
- 4. Agree on actions.** Who does what, and by when? Document it. That record is what keeps the engagement inside its scope.

The point is to create a process that exists somewhere outside your memory, so it can be handed to a team member and repeated without you in every room.

When scope creep shows up — and it will — it's usually a sign the client has outgrown their package, not that they're being difficult. That conversation gets a lot easier once there's a tier to point them toward.

And as those relationships deepen, how documents move needs to keep pace. Financial plans, ownership decisions, strategy that hasn't been shared publicly — that information deserves a real process behind it, not a scattered email thread.

When you're ready to step back or sell, there's a system to hand over instead of just a relationship to explain. Buyers pay for processes they can evaluate. They don't pay for institutional knowledge that walks out the door with the owner.



A Quick Self-Check

Check off what's already true. Whatever isn't is where to start.

Shift	Done?	Statement
S1	<input type="checkbox"/>	I have a defined service menu with clear tiers.
S1	<input type="checkbox"/>	At least one tier includes Value Level (Level 4 or Level 5) services.
S1	<input type="checkbox"/>	I present tiered options to every client, every year.
S2	<input type="checkbox"/>	I define scope before I quote a price on any engagement.
S2	<input type="checkbox"/>	I have a minimum fee and I hold it.
S2	<input type="checkbox"/>	I've updated my pricing in the last 12 months.
S2	<input type="checkbox"/>	I know what comparable firms in my market are charging based on real data.
S3	<input type="checkbox"/>	I have at least one advisory process written down that my team can follow.
S3	<input type="checkbox"/>	Advisory work is in a signed engagement — not delivered informally.
S3	<input type="checkbox"/>	I collect eSignatures and payment before work begins.
S3	<input type="checkbox"/>	Client documents come through a secure portal, not email.

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