

THE PING SYSTEM

Working With Me Guide



A customizable guide for introducing
prospective clients to your
bookkeeping business.



TOOLS. TEMPLATES. CONNECTION.

Stay in touch. Stay connected.

Make This Guide Your Own

This template is designed to give you a starting point. Before sharing it with prospective clients, customize it so it reflects your bookkeeping business and the way you work.

1. Add your branding

Replace the sample colours and fonts with your own. Add your logo, business name and photo if you use one.

2. Replace the sample text

Work through each page and replace anything in [brackets] with your own information. Adjust the sample wording wherever needed so it sounds like you.

3. Remove anything you don't need

Your guide doesn't have to include every section. If something doesn't apply to your business, delete it rather than trying to make it fit.

4. Check your next step

Make sure your final page tells prospective clients exactly what to do next. Add the correct link to your inquiry form, scheduler or contact page.

Put Your Guide to Work

Export your finished guide as a PDF and upload it to your website. You can link to it from your Contact or Work With Me page so prospective clients can learn more before they inquire.

You can also send it when someone contacts you or include the link in an automatic inquiry response.

One guide. Create it once, then use it again and again.

Welcome!

Hi, I'm [Name], owner of [Business Name].

I help [type of clients/businesses you work with] keep their bookkeeping organized, accurate and up to date, so they have reliable financial information and one less thing to manage themselves.

My goal is to make bookkeeping straightforward. You'll know what I need from you, what you can expect from me and how we'll work together along the way.

A Little About My Business

Based in: [Location / Serving clients virtually]

Working with: [Types of businesses or industries]

Bookkeeping software: [QuickBooks Online / Xero / etc.]

Next: See how I can help →

How I Can Help

I offer bookkeeping support designed to help you keep your financial records organized, accurate and up to date.

[Service One]

Add a short description of this service and what it helps your client with. Keep this to one or two sentences.

[Service Two]

Add a short description of this service and what it helps your client with. Keep this to one or two sentences.

[Service Three]

Add a short description of this service and what it helps your client with. Keep this to one or two sentences.

Not sure what you need?

That's okay. When you get in touch, we can talk about what's happening in your business and whether my services are a good fit.

What It's Like to Work With Me

Knowing what happens next can make starting with a new bookkeeper feel much easier. Here's a simple look at what you can expect.

1. Get in Touch

Start by completing my [inquiry form / contact form]. Tell me a little about your business and the bookkeeping help you're looking for.

2. We'll Make Sure It's a Good Fit

I'll review your information and [book a call with you / follow up by email / explain your next step].

3. We'll Get You Set Up

Once we decide to work together, I'll send you everything you need to get started, including [agreement / payment information / onboarding questionnaire / document requests].

4. We'll Get to Work

From there, I'll begin your bookkeeping work and let you know what to expect for ongoing communication, deadlines and anything I need from you.

Good To Know

Here are a few practical details about working with me.

How we communicate

The best way to reach me is [email / client portal / other]. I typically respond within [timeframe].

My availability

My regular business hours are [days and hours]. Meetings are available [add details if applicable].

Working together

My bookkeeping services [start at \$___ / are quoted based on your needs / are offered in monthly packages].

What happens next?

If you think we might be a good fit, the next step is simple.

[Complete my inquiry form / Book a call / Send me an email]

Once I receive your information, I'll be in touch to let you know what happens next.