



Summary

This documents reports a summary of the results of 2Shakes survey to Bookkeepers completed between 27th May and the 24th June 2016. In total responses were received from 18 bookkeepers. The responding Bookkeepers were distributed throughout NZ.

This survey shows that:

- The majority of Bookkeepers sign up new clients, on average every month (72%).
- About half of the Bookkeepers (44%) got leads from a website. But the number of new clients found this way fluctuate significantly between bookkeepers (from 95% leads though to just 1%).
- Around 40% of Bookkeepers had a busy sign up period – around end of the financial year.
- Bookkeeper see 'must have' benefit in being set up with a range of organisations. With IRD, Banks, ACC, and Companies Office being rated the most useful.
- Most Bookkeepers (65%) have to chase clients for information either all the time or frequently.

Some of the Data and Graphs collected from this survey are included in the body of this document below.

This information has been collected by 2Shakes from bookkeepers who are interested in our digital sign up and authority form. This information is provided for information purposes only. 2Shakes accepts no liability or responsibility regarding the use of this information by any third party.

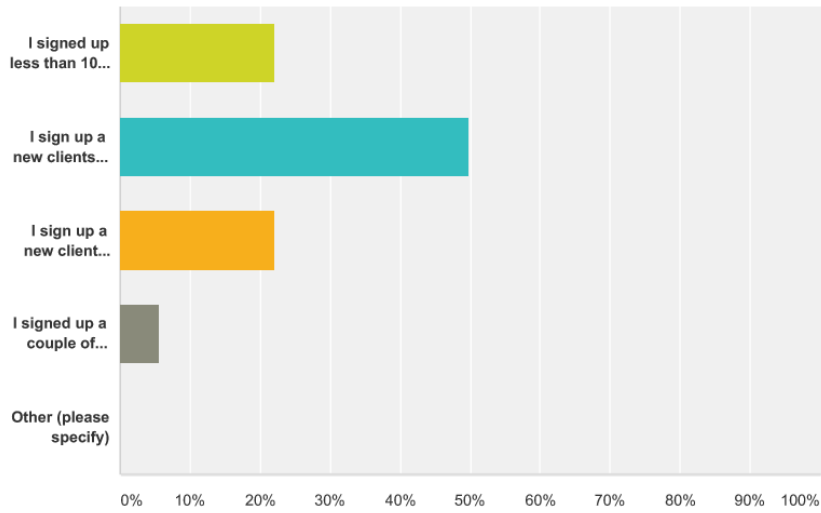
If you have any questions about this information please contact 2Shakes via our website www.2Shakes.co.nz.



Bookkeepers Survey 1: Understanding Client Sign Up

Q1 Thinking back over the past 12 months, how often did you sign up new clients?

Answered: 18 Skipped: 0



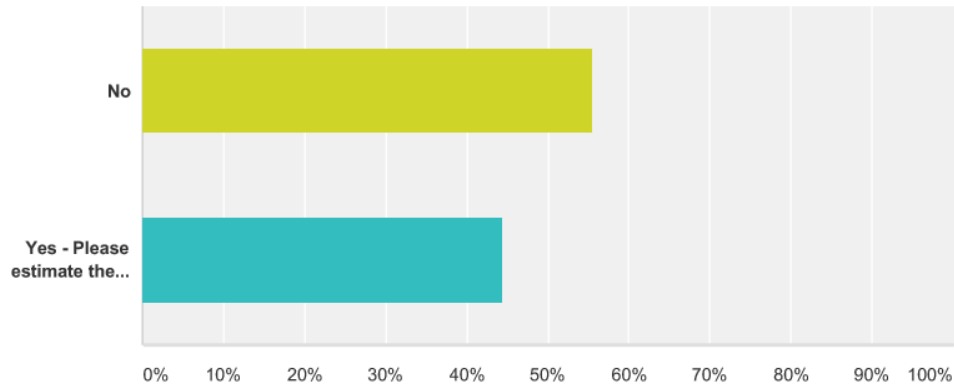
Answer Choices	Responses
I signed up less than 10 clients last year	22.22% 4
I sign up a new clients about once a month (10-20 a year)	50.00% 9
I sign up a new client every week or two (20-50 a year)	22.22% 4
I signed up a couple of clients every week (over 50 a year)	5.56% 1
Other (please specify)	0.00% 0
Total	18



Bookkeepers Survey 1: Understanding Client Sign Up

Q2 Do you get leads for new clients electronically (e.g. from a web based form)?

Answered: 18 Skipped: 0



Answer Choices	Responses
No	55.56% 10
Yes - Please estimate the % of leads come in this way?	44.44% 8
Total	18

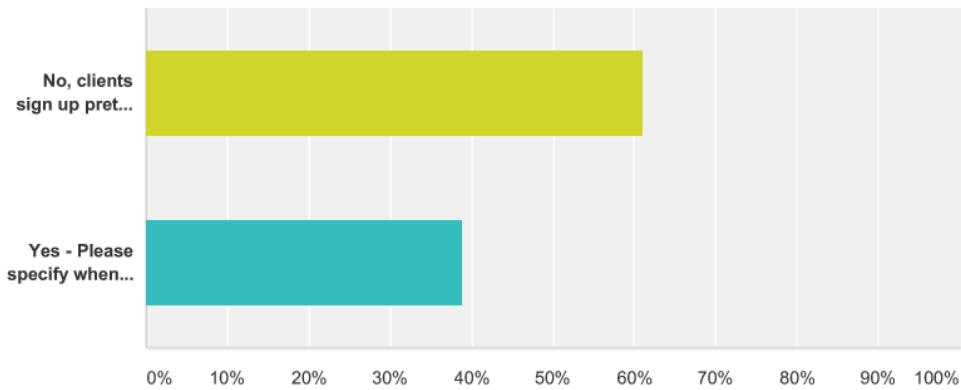
Yes - Please estimate the % of leads come in this way?
Combination of word of mouth & electronic leads - approx 10% electronically
very minimal - maybe 1%
95%
10%
20%
50%
80%
90%



Bookkeepers Survey 1: Understanding Client Sign Up

Q3 Is there a 'busy' sign up period?

Answered: 18 Skipped: 0



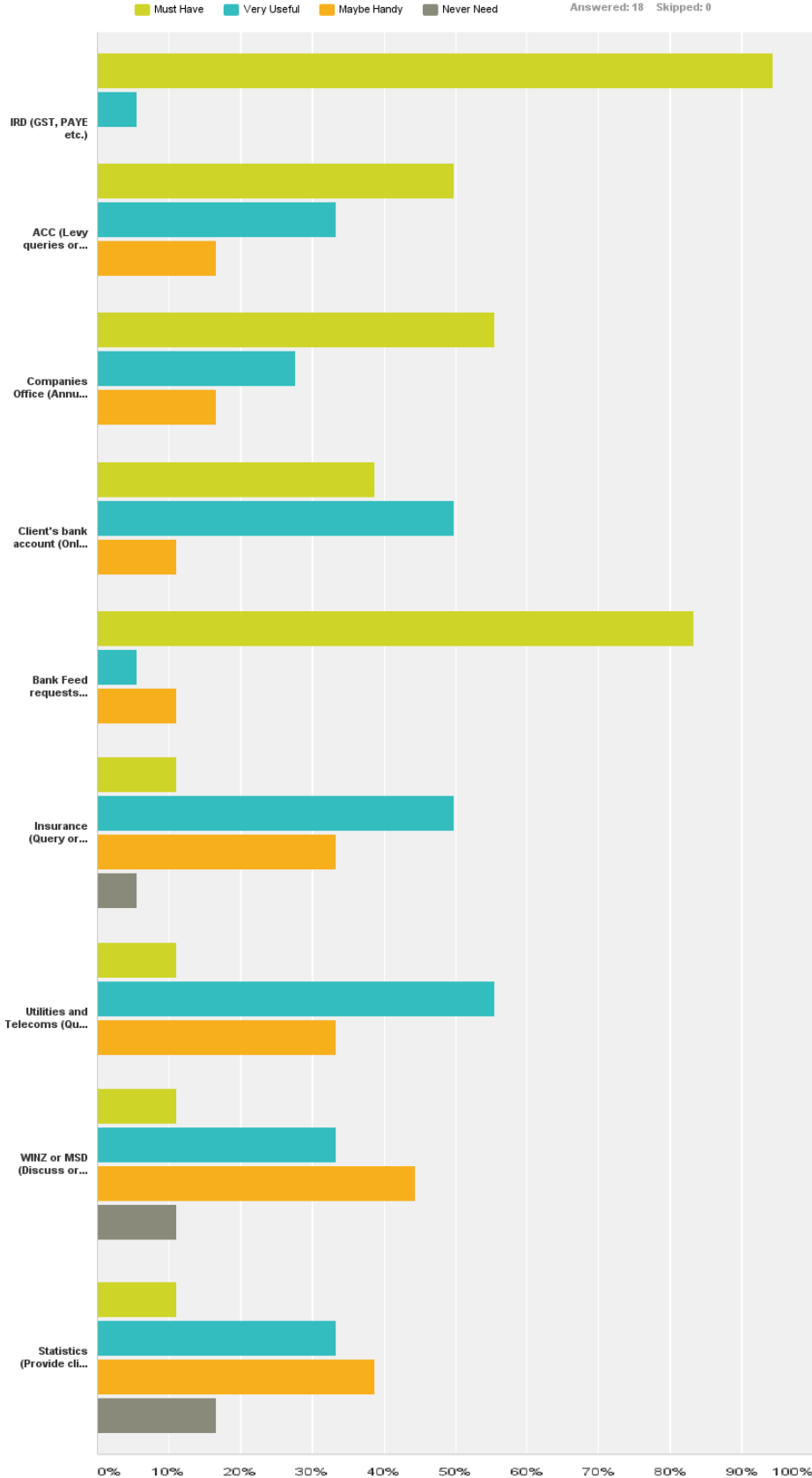
Answer Choices	Responses
No, clients sign up pretty evenly throughout the year.	61.11% 11
Yes - Please specify when and how busy it gets (i.e. 50% of my clients sign up in April)	38.89% 7
Total	18

Yes - Please specify when and how busy it gets (i.e. 50% of my clients sign up in April)
Between Feb and July
March and April 30%
25% of my clients sign up in April
March/April are busier but I sign up clients all through the year
Feb/Mar/April/May typically the busy sign up period
80% April – June
End of financial year March – May



Bookkeepers Survey 1: Understanding Client Sign Up

Q5 The 2Shakes solution gets you set up to be recognised as an agent for your clients. Thinking ahead - at which organisations would this be useful for you and your clients?





Bookkeepers Survey 1: Understanding Client Sign Up

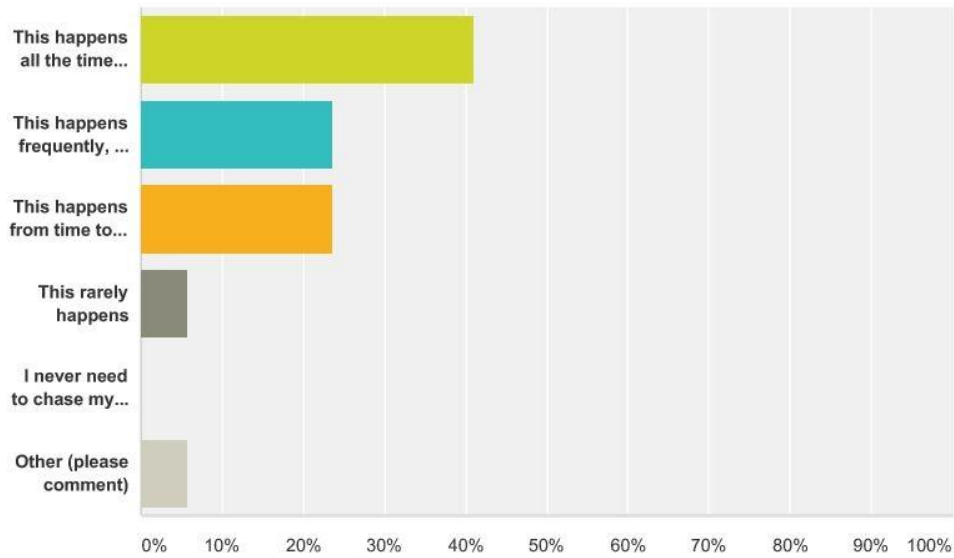
	Must Have	Very Useful	Maybe Handy	Never Need	Total
IRD (GST, PAYE etc.)	94.44% 17	5.56% 1	0.00% 0	0.00% 0	18
ACC (Levy queries or corrections, request statements)	50.00% 9	33.33% 6	16.67% 3	0.00% 0	18
Companies Office (Annual Company Return or updates to company data)	55.56% 10	27.78% 5	16.67% 3	0.00% 0	18
Client's bank account (Online access)	38.89% 7	50.00% 9	11.11% 2	0.00% 0	18
Bank Feed requests (Accounting Software)	83.33% 15	5.56% 1	11.11% 2	0.00% 0	18
Insurance (Query or correct bill, request statements)	11.11% 2	50.00% 9	33.33% 6	5.56% 1	18
Utilities and Telecoms (Query or correct bill, request statements, agree payments)	11.11% 2	55.56% 10	33.33% 6	0.00% 0	18
WINZ or MSD (Discuss or provide information on clients financial situation)	11.11% 2	33.33% 6	44.44% 8	11.11% 2	18
Statistics (Provide client financial information for surveys)	11.11% 2	33.33% 6	38.89% 7	16.67% 3	18

Other (please specify)

Councils re Rates, Watercare for Water Rates and Use queries,
Ministry of Justice for Court Fines,
DIA - Gaming Machine Key Persons information

Bookkeepers often have to 'chase' clients to get or to sign paperwork or complete online approval processes. What proportion of customers do you need to chase up?

Answered: 17 Skipped: 1



Answer Choices	Responses
This happens all the time, I chase up over half my clients	41.18% 7
This happens frequently, I chase about a third of my clients	23.53% 4
This happens from time to time, maybe 1 in 10 clients	23.53% 4
This rarely happens	5.88% 1
I never need to chase my clients	0.00% 0
Other (please comment)	5.88% 1
Total	17

Other (please comment)

I need to do it for all my clients but haven't got anything signed except linking form