# Charity: Safeguarding your practice for future success

Briefings



28 March 2025

A review of the conference From Sliding Doors to Success, in support of TaxAid and Tax Help for Older People.

A number of experts donated their time to support the tax charities TaxAid and Tax Help for Older People on 11 February at a conference arranged by Karen Eckstein and Mark Lee. The conference was hosted by the CIOT and all funds raised were donated to the charities.

The conference focused on issues which could be damaging to the future of a business, with key practical tips on how to avoid those risk areas, as well as on ways to develop and grow businesses in the future. Those attending the conference therefore came away with a practical and informed range of information about how to help their businesses thrive and succeed well into the future.

The level of interest was clearly demonstrated by the number and range of questions raised in the Panel Q&A at the end of the afternoon.

## Risks in the new world

We have all heard of cyber and IT risks but are perhaps unsure what they could mean for us in practice. The first session, given by Karen Eckstein and Jenna Rigg, introduced delegates to Peter, an accountant in a smaller accountancy firm. They witnessed his worst day ever when everything that could go wrong does – he sent an email to the wrong person, went to make a cup of tea while his flatmate used his laptop to order goods from Amazon, lost his laptop, and suffered a ransomware attack. Karen and Jenna explained the need for adequate IT processes and protections, how easy it is to implement them, and the possible alternative to Peter's day. It led to a lot of questions in the panel Q&A at the end of the day!

**Karen Eckstein** (Karen Eckstein Ltd): Karen@Kareneckstein.co.uk

**Jenna Rigg** (Singularitee): Jenna.rigg@singularitee.co.uk

## Beware of sliding doors

The second session was given by professional indemnity broker Colin Taylor, who posed the question 'Why do mistakes happen?' Many well-qualified people believe that a lack of knowledge is the root cause of PII claims. Colin explained how often he hears well qualified, experienced and knowledgeable people say things like 'I cannot believe I missed that', 'I cannot explain why I did that' and 'I was sure I made a note about that conversation'. He explored the reasons why such situations occur and how our brains function under heavy workloads, highlighting key risk management techniques to reduce the possibility of errors occuring and how to be in a better position to defend your firm when an allegation is made.

**Colin Taylor** (Howdens): colin.taylor@howdengroup.com

## Complaints about your work from clients and your professional body

The third session of the day, given by Karen Eckstein, focused on complaints. Sadly, these are becoming more common, whether from clients or the firm's regulator. Mistakes in handling those complaints often make issues far worse. This practical talk described common mistakes, how to avoid them, and how to survive the

process! Karen also gave a lot of tips on how to manage the issues, such as where to log complaints, who should handle them internally, and having a ‘complaints’ email address. She also discussed how lessons can be learned to improve the firm’s processes so that mistakes are not repeated.

**Karen Eckstein** (Karen Eckstein Ltd)

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### How to be better remembered, referred and recommended

The final talk was by Mark Lee, who shared a tailored extract from his keynote talk on how to be better remembered, referred and recommended. His advice was focused around three key areas: making your mark; making better connections; and making better use of LinkedIn. Mark shared his approach to having more powerful networking conversations and explained how tax advisers can use LinkedIn to generate real business benefits as tax advisers and accountants.

**Mark Lee:** www.bookmarklee.co.uk

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### The Q&As

A wide range of questions were asked during the panel session, ranging from cyber insurance to how to protect documents from being read by unauthorised third parties. The panel also discussed limitation of liability, how to get support to handle complaints, how to deal with a complaint if the client hasn’t paid your fees and how to deal with complaints where fees were outstanding.

### Feedback from the conference

The feedback from the conference was overwhelmingly positive. ‘This is an excellent seminar. The material is highly relevant, interesting and practical. And it is valuable for anyone who is in practice, whether they are the owner, a manager or a pure caseworker. The speakers are first rate . The event is lively, engaging and has immediate practical relevance. The live Q&A is a real bonus.’

## Supporting TaxAid and Tax Help for Older People

You can support TaxAid and Tax Help for Older People by making a donation. If you can, please donate at https://cafdonate.cafonline.org/18211. The funds raised will be split equally between the two charities. Thank you for your generosity.

If you missed the conference, you can purchase the recording at: tinyurl.com/mrzua2z6. The cost is £50 and your payment will go to the tax charities, as everyone has given their time for free.