

BREAKING THE

m041d

ACCOUNTING RE-IMAGINED

Welcome to your onboarding roadmap

What to expect in your first 90 days



btmgroupci.com

Apt 6, Reef House, Havelet Waters, South Esplanade, GY1 1BJ, Guernsey

Welcome to Breaking the Mould Accounting

A Personalised and Efficient Onboarding Journey

At BTM, we believe onboarding should give you clarity and confidence from day one. Our process is designed to make the transition simple, structured, and stress-free — so you can focus on running your business while we take care of the details.



Welcome & Kickoff

- 01 Introductory call with your Client Coordinator
- 02 Onboarding form completed
- 03 Letter of Engagement signed
- 04 Pre-boarding call to agree next steps and timelines

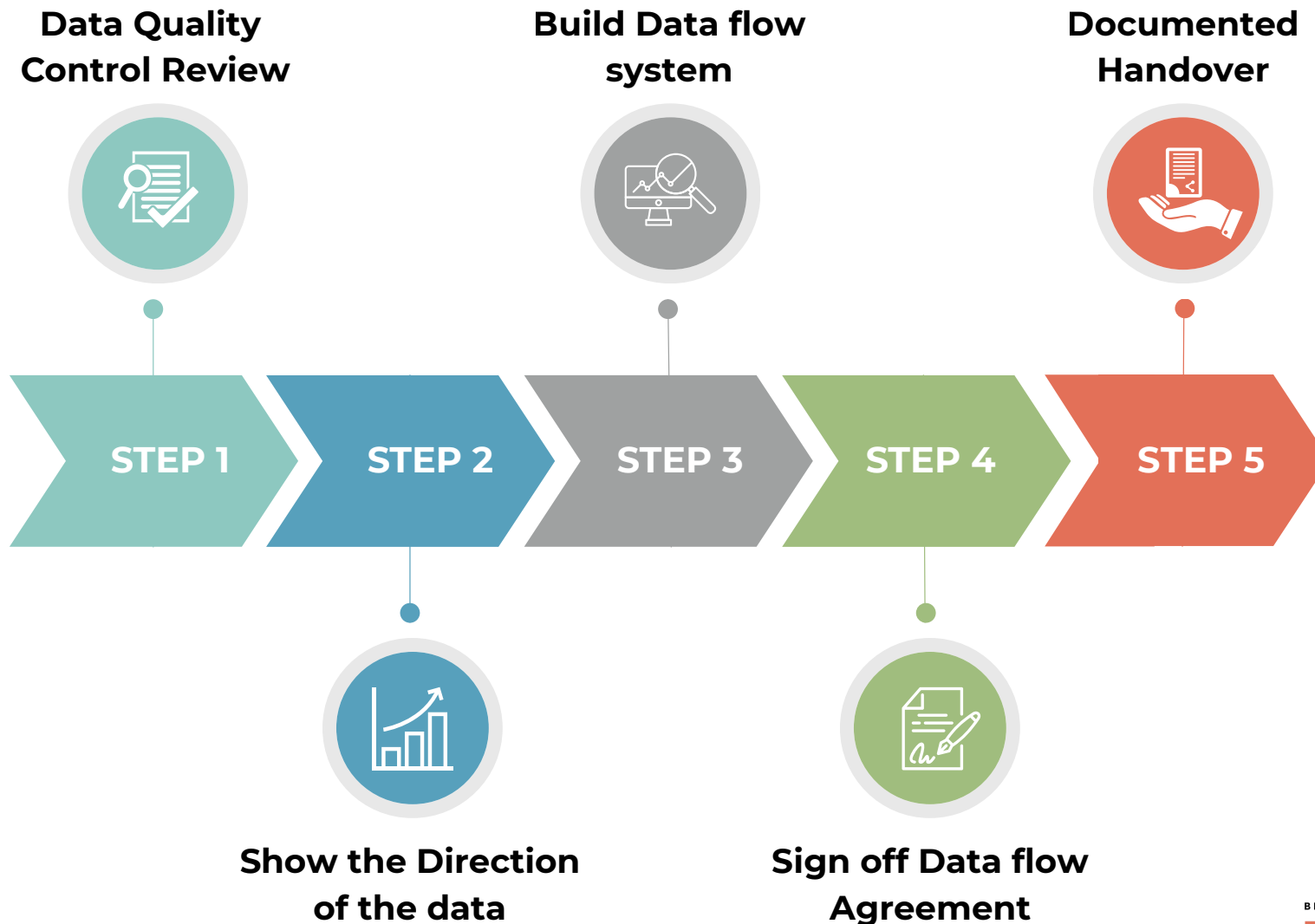
Your Business Growth Accelerator Program

The next steps to take

We understand the challenges of implementing a new Business finance system. That's why we developed our **Business Growth Accelerator Program**, a comprehensive approach to ensure a smooth and efficient transition for you, your team, and your business.



Controlling the Data Flow



Your Personalised Onboarding Path

Our onboarding process makes switching simple and stress-free. We focus on three core areas to get you set up quickly and securely:



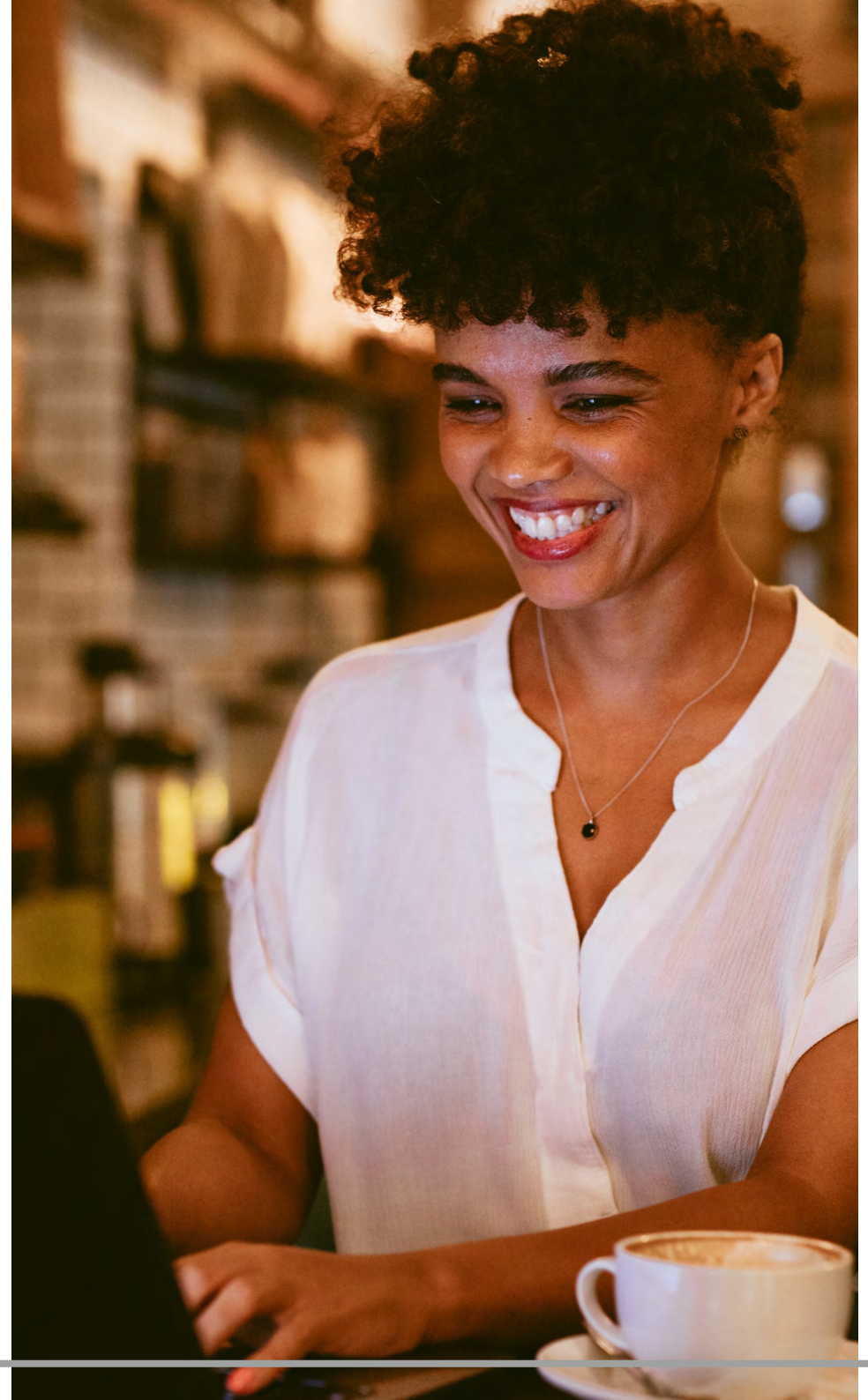
1. Laying the Foundation



2. Compliance Check-In



3. Obtaining Tax Clearance



“

Alasdair has a sound **knowledge of accounting** and has a great commercial pedigree with his all-round **Business experience** accumulated in a variety of roles. Very personable and approachable

Business Owner at Guernsey

”

“

I worked with Alasdair for a few years and **it was a great experience** all around. Very pleasant guy on a personal level and a **forward looking Director** on the professional level. I would be more than happy to work with Alasdair at any point in time!

Business Owner at Guernsey

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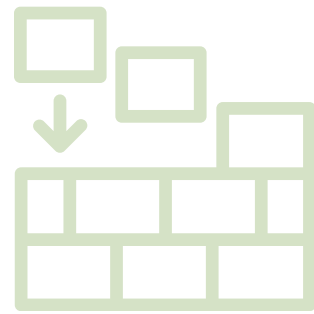
Alasdair is **brilliant technically** and has a very analytical mind. **He is an absolute pleasure to work with** and can manage a team to meet deadlines and deliver quality work.

Business Owner at Guernsey

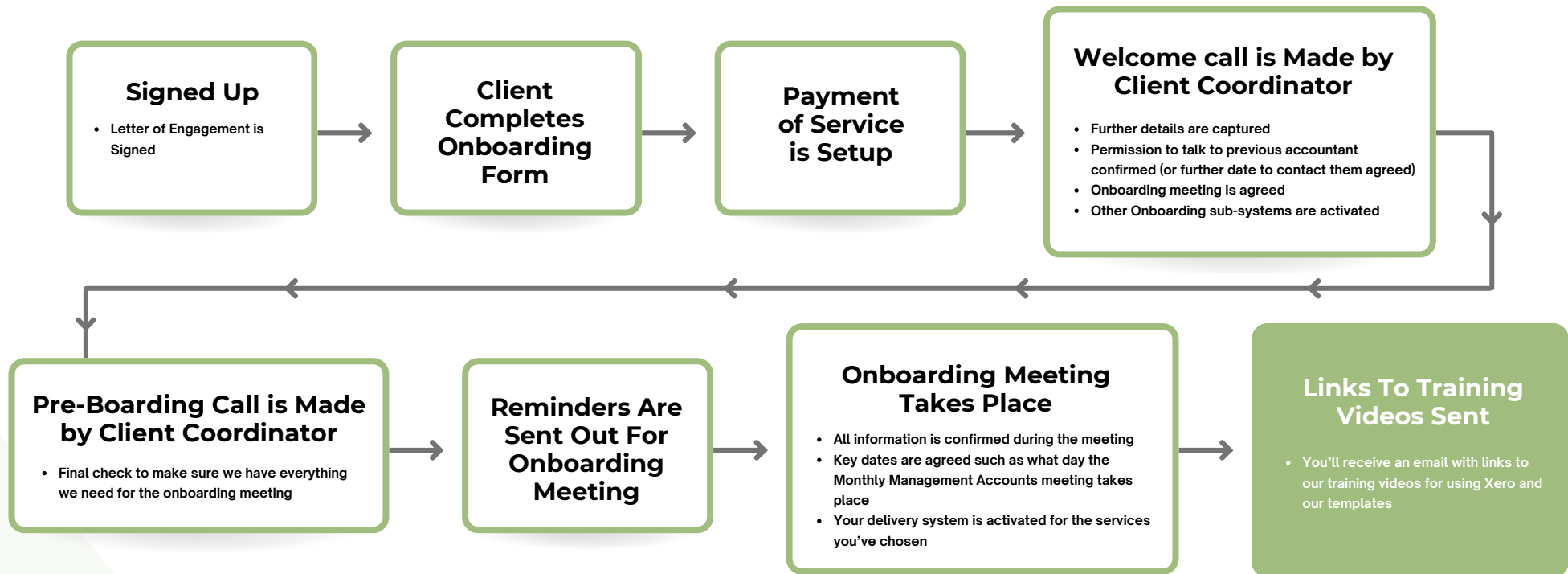
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Your Personalised Onboarding Path

1. Laying the Foundation



The foundation is how we ensure successful implementation and on-time launch of all services by establishing a solid technical infrastructure and diligently managing the setup process.

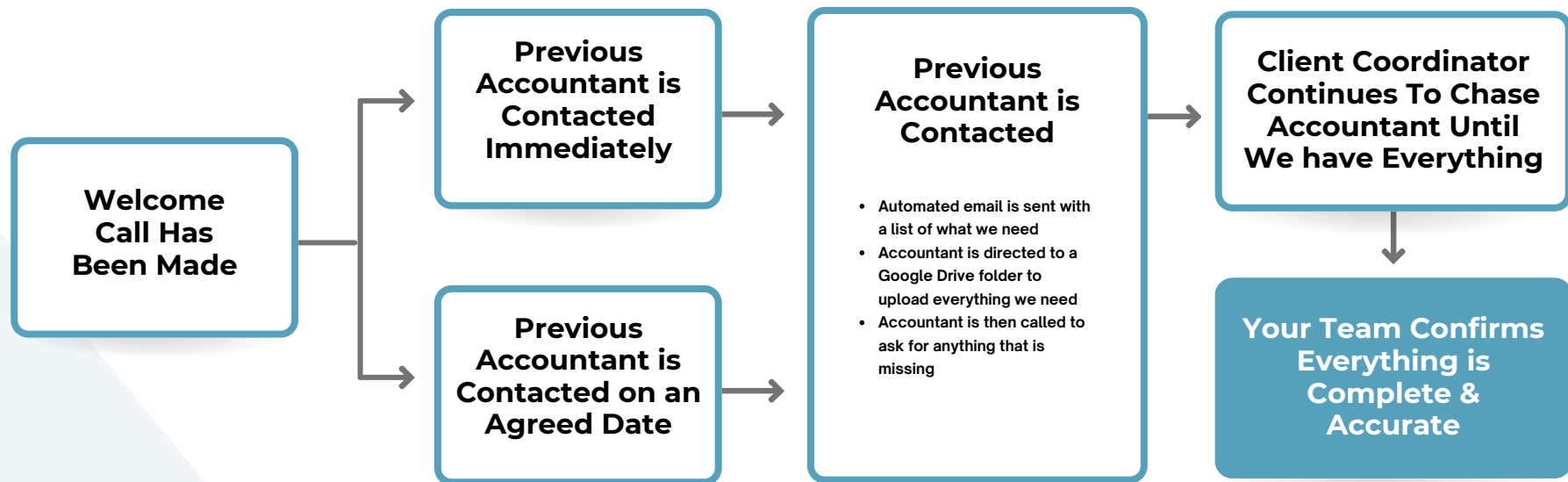




Your Personalised Onboarding Path

2. Compliance Check-in

The foundation is how we ensure successful implementation and on-time launch of all services by establishing a solid technical infrastructure and diligently managing the setup process.

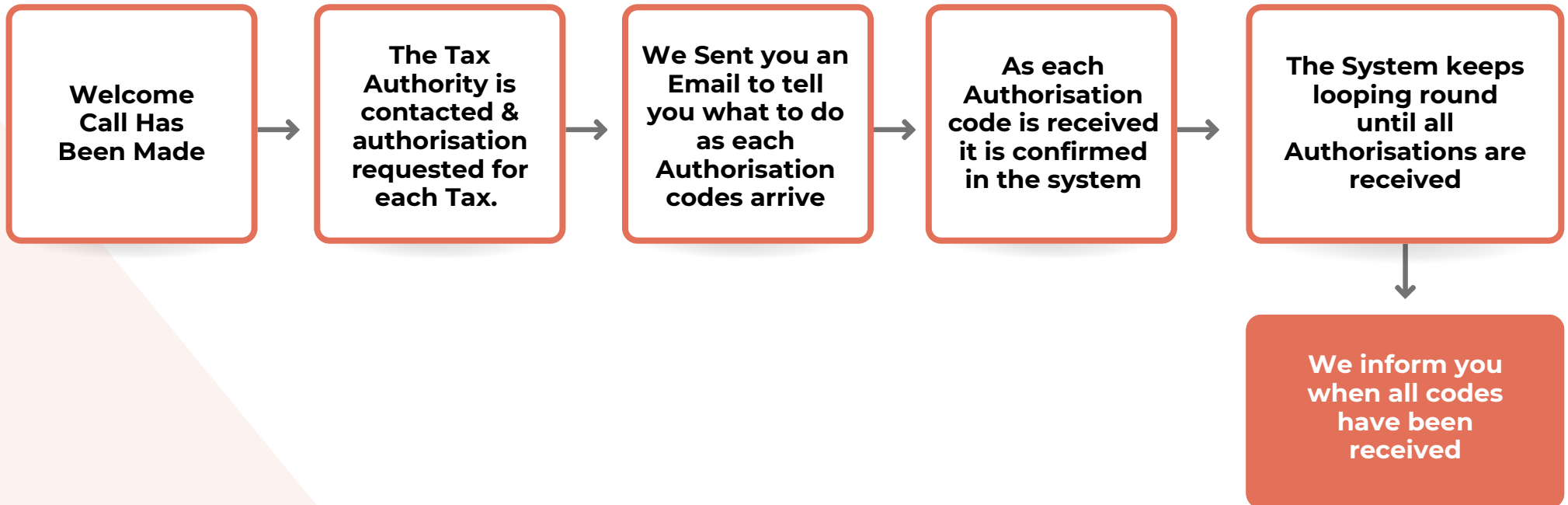


Your Personalised Onboarding Path

3. Obtaining Tax Clearance



We will need to acquire authorisation from HMRC / other revenue service to be able to access your details and act as your agent. We need authorisation for up to 4 types of tax and we want this system to keep running until all 4 have been provided.



Unlocking Business Potential

Powerful Systems, Dedicated People

At BTM, we know that sustainable growth comes from combining the right systems with the right people. That's why our approach to finance blends cutting-edge technology with the expertise of our experienced team.

Efficient Systems

We streamline your finance processes with tools like Xero and integrated apps, giving you real-time visibility of your numbers and removing unnecessary admin.

Expert Support

Our team isn't just here to process data. We provide insight, guidance, and accountability so you can make informed decisions with confidence.

Partnership Approach

We see ourselves as an extension of your business. You'll have a dedicated finance partner who understands your goals and works with you to achieve them.

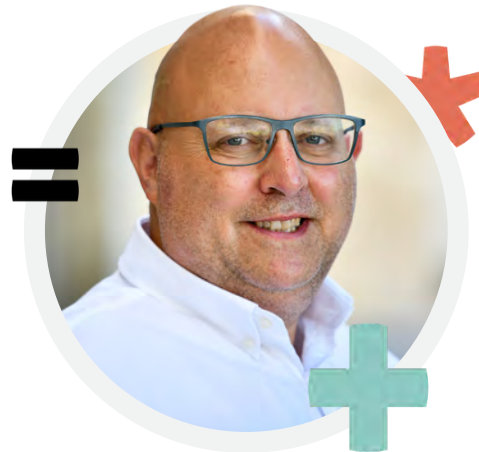
Together, this combination of systems and people unlocks real business potential — freeing your time, giving you clarity, and helping you focus on growth.



We're Here to Help

Our onboarding process is about more than forms and systems, it's about giving you a smooth start and setting the foundation for long-term success.

Alasdair Milroy FCA



Contact us



+442038847850



hello@btmgroupci.com



Apt 6, Reef House,
Havelet Waters, South
Esplanade, GY1 1BJ,
Guernsey

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We look forward to speaking with you

Frequently Asked Questions

Get the answers you need to the most commonly asked questions

Will my old accountant be contacted before I'm ready?

No — we only approach your previous accountant once you've told them about the move.

How do you access my systems securely?

We'll guide you through setting up permissions and logins, ensuring secure data handling at every stage.

What if my records are incomplete or messy?

That's common. We'll review your data early and let you know if any extra work is needed before we begin.

Will the date of the onboarding meeting affect the date of when my services start?

Ideally we would like to have the onboarding meeting first to fully plan everything out. If this can't be achieved that will not be a problem.

Further Questions?

If you have more questions, contact us at hello@btmaccounting.com

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