

The accounting practice *playbook*

How to become the accountant ChatGPT names when owners ask



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ChatGPT recommends practices it can match to a client's situation and then check. Lead with a clear specialism by sector or client type, show named partners with their ICAEW, ACCA, ICAS or CIOT credentials, and keep your professional and software directory listings consistent. Then publish dated, plain-English explainers on the changes owners ask about, and update them whenever HMRC or Companies House guidance changes.

For managing partners and practice owners at UK accountancy and tax practices serving owner-managed businesses.

Accountancy is still a referral business, but more referrals now pass through an AI assistant first. For example, an ecommerce owner whose accountant takes a week to reply asks ChatGPT which accountants in Bristol specialise in online retail and work with Xero. A software founder asks Perplexity who in London knows SaaS and R&D tax relief. The assistant names a few practices, and those are the ones that get the call.

The practice that is not named never hears about the enquiry. Assistants answer basic tax questions themselves, so generic articles earn you nothing. What they cannot supply is judgement for a specific kind of client, and that is exactly what the practices they recommend have written down. Rule changes create a steady stream of these questions, and each one is a likely prospective client.

860,000+

sole traders and landlords had to start Making Tax Digital reporting from 6 April 2026

HMRC, FEBRUARY 2026

436,000+

had sent their first quarterly update by August 2026

HMRC, AUGUST 2026

£90,000

VAT registration threshold since 1 April 2024, up from £85,000

HMRC, MARCH 2024

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The questions that decide *who gets the call.*

Owners describe their business, their problem and often a frustration with their current adviser.

BUYER ASKS

Which accountants in Bristol specialise in ecommerce businesses and work with Xero?

BUYER ASKS

Which accountants specialise in SaaS companies and R&D tax credits in London?

BUYER ASKS

Best accountants for dental practices in the North West

BUYER ASKS

Do I need to sign up for Making Tax Digital if I earn £40,000 from property?

BUYER ASKS

How do I verify my identity at Companies House as a director?

BUYER ASKS

Is it worth switching from a high street accountant to an online accountant?

BUYER ASKS

How much does an outsourced finance director cost per month in the UK?

TRY THIS Ask five of these in ChatGPT, Gemini, Claude, Copilot and Perplexity, each in a fresh chat. Note who is named, and who is named instead of you. Answers vary from run to run, so only count a result that repeats.

How the assistants choose

01 A clear specialism

'Accountants for small businesses' matches nothing.
'Accountants for dental practices across the North West, from associates to multi-site groups' matches a real question.

02 Checkable credentials

Partners and senior staff named with their qualifications and professional body, whether the firm is a registered auditor, and who supervises it for anti-money laundering.

03 Independent listings

Professional body and software partner directories, awards such as the British Accountancy Awards and coverage in AccountingWEB, Accountancy Age or regional business press.

04 Specific reviews

Recent Google and Trustpilot reviews that say what you did. 'Sorted out our VAT registration and explained it properly' says more than five stars.

05 Consistency

After mergers and group deals, old names, offices and departed partners linger on directories for years. If an assistant finds you under three names, it struggles to connect the evidence.

The sources assistants *trust in your field.*

An assistant rarely names a firm on its own website's word. It looks for the same facts in places that have checked you independently. These are the ones that matter most for accounting practices.

SOURCE	WHY IT COUNTS	WHAT TO DO
ICAEW Find a Chartered Accountant	An independent record of member firms that an assistant can check against your website.	Match your trading name, offices, services and sectors exactly to your website.
ACCA Find an ACCA accountancy firm	Another professional body record that confirms who you are and what you do.	List the same details, plus the partners who hold practising certificates.
ICAS Find a CA	The professional record for ICAS firms, including Scottish offices.	Name Scottish offices the same way they appear on your website.
Xero, QuickBooks and Sage partner directories	Software partner listings describe your sectors and the tools you support from the outside.	Describe your sectors, specialisms and supported apps in plain words that match your site.
GOV.UK guidance from HMRC and Companies House	Assistants lean on official guidance for deciding questions about Making Tax Digital, identity checks, VAT and R&D.	Link each of your dated explainers to the official guidance it is based on.
Google and Trustpilot reviews	Specific reviews show an assistant what kind of work you do well.	Ask clients to describe the problem you solved, and reply without disclosing anything about their affairs.

Common mistakes

Relying on syndicated newsletters

The same supplied articles appear word for word on hundreds of practice websites, so they tell an assistant nothing about yours. Keep them if clients like them, but put your effort into content only you could write.

Thinking only about finding questions

Most practices focus on 'best accountant in' searches. The deciding questions, such as Making Tax Digital or switching, are where owners judge who knows what they are talking about.

Leaving the supervisor statement undated

The government has decided the FCA will take over anti-money laundering supervision once Parliament legislates. Name your current supervisor accurately, date it and update it when the transfer happens.

Letting a merger split your identity

Keeping an old name on some directories and a group name on others splits the evidence. Decide how you want to be known, explain the change on your site and make every listing match.

Ten questions. *Be honest.*

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- | | | | |
|----|--|------------------------------|-----------------------------|
| 01 | Does your website lead with one or two named sectors or client types, rather than a long list of services? | ☐ Yes | ☐ No |
|----|--|------------------------------|-----------------------------|
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- | | | | |
|----|--|------------------------------|-----------------------------|
| 02 | Do you have a proper sector page for your biggest client sector, written by the partner who looks after those clients? | ☐ Yes | ☐ No |
|----|--|------------------------------|-----------------------------|
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- | | | | |
|----|---|------------------------------|-----------------------------|
| 03 | Does every partner's profile give their qualifications, professional body and sector focus in plain text? | ☐ Yes | ☐ No |
|----|---|------------------------------|-----------------------------|
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- | | | | |
|----|---|------------------------------|-----------------------------|
| 04 | Do your ICAEW, ACCA or ICAS listings match your website on trading name, offices, services and sectors? | ☐ Yes | ☐ No |
|----|---|------------------------------|-----------------------------|
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- | | | | |
|----|---|------------------------------|-----------------------------|
| 05 | Do your Xero, QuickBooks and Sage listings show only current names, offices and people? | ☐ Yes | ☐ No |
|----|---|------------------------------|-----------------------------|
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- | | | | |
|----|---|------------------------------|-----------------------------|
| 06 | Have you published dated explainers on Making Tax Digital thresholds and Companies House identity verification, linked to GOV.UK? | ☐ Yes | ☐ No |
|----|---|------------------------------|-----------------------------|
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- | | | | |
|----|---|------------------------------|-----------------------------|
| 07 | Do you add an 'updated' line to those explainers when guidance changes, rather than writing a new post? | ☐ Yes | ☐ No |
|----|---|------------------------------|-----------------------------|
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- | | | | |
|----|--|------------------------------|-----------------------------|
| 08 | Does your website state your anti-money laundering supervisor and your HMRC tax adviser registration, with the date? | ☐ Yes | ☐ No |
|----|--|------------------------------|-----------------------------|
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- | | | | |
|----|--|------------------------------|-----------------------------|
| 09 | Have you published how your fees work and how switching accountant works for your most common client type? | ☐ Yes | ☐ No |
|----|--|------------------------------|-----------------------------|
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- | | | | |
|----|--|------------------------------|-----------------------------|
| 10 | Is most of your published content written by your own team, rather than syndicated articles shared with other practices? | ☐ Yes | ☐ No |
|----|--|------------------------------|-----------------------------|
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Fewer than seven yeses means owners asking an assistant for an accountant are probably being given other practices' names.

What to do this month, *and next*.

This month

- 01 Choose the one or two sectors where you have the most clients and experience, and write a proper sector page for each: the client's question in their language, the main issues, how you work, evidence and fees.
- 02 Update every partner's profile with qualifications, professional body, sector focus and a short plain-text biography.
- 03 Check your ICAEW, ACCA or ICAS listing and your Xero, QuickBooks and Sage listings, and correct old names, offices and people.
- 04 Publish or update dated explainers on Making Tax Digital thresholds and Companies House identity verification, linked to GOV.UK.
- 05 State your anti-money laundering supervisor and your HMRC tax adviser registration on your website, with the date.
- 06 Publish a fees and switching page for your most common client type.

The next ninety days

- 01 Ask clients for recent, specific Google and Trustpilot reviews that say what you did, and reply without disclosing anything about their affairs.
- 02 Add dated explainers on the VAT registration threshold and R&D tax relief, including the R&D intensive support test in plain words.
- 03 Say clearly on your website if you are a Companies House authorised agent, because owners ask assistants who can verify their identity for them.
- 04 Replace syndicated articles over time with guides built from the questions your team answers every week.
- 05 Set up a fixed list of 20 to 50 questions covering your sectors, services and towns, and run it several times a month.

How to tell it is working

- Your practice named on more of your fixed questions across ChatGPT, Google's AI Overviews and AI Mode, Copilot, Gemini, Perplexity and Claude, counting a win only when it repeats.
- Enquiries that tick 'AI assistant such as ChatGPT' on your enquiry form.
- How you are described, and which sources the assistant cites, recorded each month.
- Prospects arriving having already read your fees and decided they can afford you.

Straight answers.

Do I need to sign up for Making Tax Digital if I earn £40,000 from property?

It depends on the year. A landlord whose only qualifying income is £40,000 of rent was under the £50,000 test for 2024 to 2025, so did not have to join in April 2026. Because £40,000 is over the £30,000 test for 2025 to 2026, HMRC's guidance says Making Tax Digital applies from 6 April 2027. A practice should answer this on its own site.

How do I verify my identity at Companies House as a director?

Through GOV.UK One Login or through an Authorised Corporate Service Provider, also called a Companies House authorised agent. New directors verify on appointment or within 14 days, depending on their situation. Existing directors give their personal code with the company's next confirmation statement. If your practice is an authorised agent, say so on your website.

We use syndicated articles from our website provider. Is that a problem?

It is not harmful in itself, but it does little for you, because the same articles appear on many other practices' sites. Keep them if clients find them useful. Put your effort into content only you could write: sector pages, plain explanations of rule changes and guides built from the questions your team answers every week.

Our practice has joined a larger group. What should we do about our name?

Decide how you want to be known, then make every listing match. If you keep your local brand, say clearly that you are part of the group. If you move to the group name, update your website, Google Business Profile and directories, and explain the change on your site so clients and assistants can connect the old name to the new one.



ID-Pal is a technology company rather than an accountancy practice, but accountants are among its buyers, and accountancy was one of the five industry pages rebuilt for it.

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UK buyer questions where AI now names ID-Pal

PROBLEM	Traffic to the pages that bring in enquiries fell by around 40 per cent after the NorthRow move, and AI never put ID-Pal on a UK shortlist.
WHAT WE DID	A Paid Discovery found the cause in a week. The fix was live in week one, then we rebuilt the pages buyers ask about.
RESULT	Named on four UK buyer questions by September 2026, up from none in May.

“They work like founders: they get on with it, and they tell you the truth.”

Dan Brooksbank, Marketing Director, ID-Pal

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Which accountant does ChatGPT recommend, and why is it not us? ↗

Why does ChatGPT never quote our blog, and how do we fix it? ↗

Does ChatGPT prefer newer content, and how old is too old? ↗

Why does ChatGPT describe my firm wrongly, and how do I fix it? ↗

How do we find out whether ChatGPT is recommending our firm? ↗

Should our content answer the questions our customers actually ask? ↗

SOURCES

[HMRC, Act now: 864,000 sole traders and landlords face new tax rules in two months \(February 2026\)](#)

[HMRC, 436,000 sole traders and landlords make their tax digital \(August 2026\)](#)

[HMRC, Check if you're eligible for Making Tax Digital for Income Tax \(March 2026\)](#)

[Companies House, When you need to verify your identity for Companies House \(July 2026\)](#)

[HM Treasury, Reforming anti-money laundering and counter-terrorism financing supervision: consultation response \(October 2025\)](#)

[HMRC, Mandatory tax adviser registration with HMRC \(November 2025\)](#)

[HMRC, VAT: increasing the registration and deregistration thresholds \(March 2024\)](#)

[HMRC, R&D tax relief: the merged scheme and enhanced R&D intensive support \(January 2026\)](#)



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Ross built and ran a subscription business for twenty-one years, bootstrapped. He wrote *Subscribe and Conquer* and established the Fortitude Foundation.

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