



MTD: The Practice Playbook

**FROM COMPLIANCE
TO CAPACITY**

A practical guide to improving your MTD workflow, client
experience and practice capacity.

REVIEW IT → RESET IT → RUN IT → REFINE IT → SCALE IT

Getting through MTD was only the beginning

MTD is now part of how practices work.

The first live quarters taught us something important: submitting the update is rarely the hardest part. The real challenge is everything around it — getting records in, changing behaviours, resolving queries, reviewing the right things and finding the capacity to do it again.

The question is no longer “*Are we ready for MTD?*” It is: **“How do we make MTD easier to run, more profitable to deliver and more scalable as the next clients arrive?”**



BUILT FROM PRACTICE, NOT THEORY. Shaped by real conversations with practitioners delivering MTD.

THEN

- Who is in scope?
- Which software should we use?
- How do we get clients ready?
- What should we charge?
- How do we submit?
- How do we prepare?

NOW

- What did the first quarters teach us?**
- Is the solution still right?**
- How do we improve client behaviour?**
- Did the price match the work?**
- How do we make the workflow easier?**
- How do we create capacity for what comes next?**

WORKBOOK ACTION

What is the one thing about your first MTD quarters that you would not want to repeat?

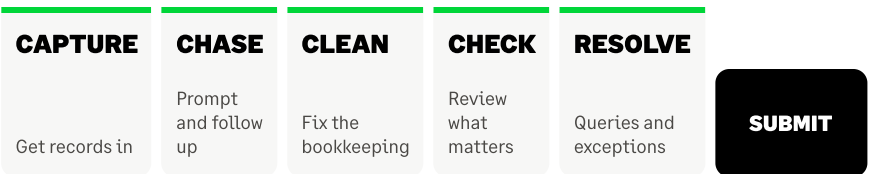
The filing isn't the hard part

INTRODUCTION

The real work happens before you press Submit.

Once the records are ready, completing an MTD update can be relatively straightforward. The capacity challenge sits upstream: getting information in, chasing clients, fixing bookkeeping, resolving queries, reviewing records and dealing with exceptions.

WHERE THE WORK ACTUALLY SITS



Five stages of effort. One stage of filing.

A small piece of friction once may be manageable. The same friction across every client, every obligation and every quarter quickly becomes a capacity problem.

DON'T OPTIMISE THE FILING. OPTIMISE EVERYTHING THAT HAPPENS BEFORE IT.

WORKBOOK ACTION

☐ Getting records in

☐ Chasing

☐ Cleaning bookkeeping

☐ Queries

☐ Review

☐ Software/ authorisation

☐ Submission

☐ Other: _____

Quick check: mark the **two** that cost you the most time.

From compliance to capacity

THE FRAMEWORK

Five practical phases to make MTD easier to run, easier to improve and easier to scale.

The first live quarters have given practices something they did not have before: **evidence**. Evidence about client behaviour, workflow friction, pricing, review effort and where capacity is really being consumed. This playbook turns that evidence into action.

1	2	3	4	5
REVIEW IT	RESET IT	RUN IT	REFINE IT	SCALE IT
Understand what happened	Change the model	Build rhythm	Remove friction	Prepare for what comes next
EVIDENCE	BETTER DECISIONS	CONSISTENCY	EFFICIENCY	CAPACITY & CHOICE

WORKBOOK ACTION

Where is your practice today?

☐

Review it

☐

Reset it

☐

Run it

☐

Refine it

☐

Scale it

Tick all that apply — most practices sit in more than one.

FROM PRACTICE

“We didn’t need a new system. We needed to stop doing the same three things late every quarter.”

START HERE

NEXT: REVIEW IT →

Look at the quarter you have just delivered before you change anything.

Don't repeat the quarter. Learn from it.

Before you improve the process, understand what really happened.

MTD REALITY CHECK

1 = PAINFUL · 5 = WORKING WELL

WORKBOOK ACTION

 Client behaviour	☐	☐	☐	☐	☐
 Data quality	☐	☐	☐	☐	☐
 Workflow	☐	☐	☐	☐	☐
 Team & ownership	☐	☐	☐	☐	☐
 Technology	☐	☐	☐	☐	☐
 Review	☐	☐	☐	☐	☐
 Timing	☐	☐	☐	☐	☐
 Commercially	☐	☐	☐	☐	☐

What surprised you?

What caused the most frustration?

What worked better than expected?

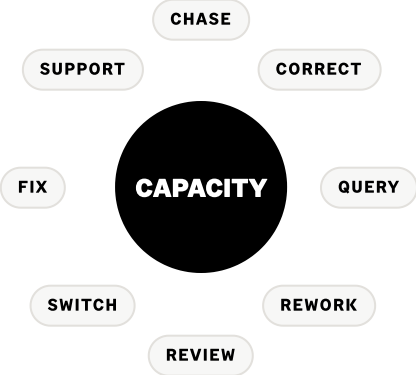
THE REAL TEST

If your MTD client numbers doubled tomorrow, which part of your process would break first?

Where did the time really go?

The biggest capacity drain is often the work you never planned to do.

THE HIDDEN HOURS OF MTD



THE SUBMISSION MAY TAKE MINUTES. THE SURROUNDING ACTIVITY CAN TAKE HOURS.

PLOT YOUR OWN DRAINS: HOW OFTEN × HOW MUCH IT COSTS

OFTEN · HIGH IMPACT	RARELY · HIGH IMPACT
OFTEN · LOW IMPACT	RARELY · LOW IMPACT

WORKBOOK ACTION

Do the maths on one drain

_____ minutes × _____ obligations × 4 quarters = _____ hours

Count obligations, not clients

One MTD client does not always equal one quarterly update.

CLIENTS × OBLIGATIONS × TOUCHPOINTS × FRICTION = CAPACITY DEMAND

ONE CLIENT RARELY MEANS ONE JOB



One client



Two or more obligations



Four quarters each

Capacity demand

FROM PRACTICE

"We had 44 clients. Then I realised that was 60 quarterly updates."

WORKBOOK ACTION

CLIENT TYPE

CLIENTS UPDATES

Self-employment

Property

Both

Multiple trades

Other / complex

Total obligations × 4 = _____

What should you protect, improve or stop?

Not everything needs changing. But repeating known friction is a choice.

PROTECT

What already works?

IMPROVE

What works with too much effort?

STOP

What is no longer sustainable?

A PROCESS IS ONLY REPEATABLE IF IT WORKS DURING NORMAL WORKING HOURS.

MARK YOUR BASELINE

Under pressure	☐	☐	☐	☐	☐	Repeatable
Manual	☐	☐	☐	☐	☐	Streamlined
Reactive	☐	☐	☐	☐	☐	Controlled
Capacity consuming	☐	☐	☐	☐	☐	Capacity creating

NEXT

RESET IT →

You have the evidence. Now change the model.

Meet your MTD clients

Different clients. Different behaviours. Different ways of working.

01



On-the-Tools Operator
Works on site, phone in hand
Typically photos of receipts, cash jobs
May need mobile capture and a weekly nudge

02



Local Service Operator
Works behind a counter, fixed hours
Typically card takings, till reports
May need bank rules and one monthly check

03...



Desk-Based Professional
Works at a laptop, invoices from a template
Typically tidy records, low volume
May need light-touch quarterly review only

04



Digital-but-Complex Operator
Works across several systems
Typically good data, awkward joins
May need clear mapping and exception routing

05



Property Owner / Landlord
Works to an annual habit, not a quarterly one
Typically agent statements, mixed sources
May need an agreed cut-off per property

06



Traditional Annual Client
Works on paper, once a year
Typically a bag of records in month ten
May need a new agreement, or a different model

READ EVERY CLIENT THROUGH FOUR LENSES

How do they work?

Digital confidence

Who owns the bookkeeping?

Complexity

THEN OVERLAY BEHAVIOUR

Proactive Self-Server

Cooperative Delegator

Annual Bag-of-Records

Resistant / Avoidant

PERSONA TELLS YOU WHERE TO START. BEHAVIOUR TELLS YOU HOW TO WORK.

Segment by behaviour, not just turnover

The smallest client is not necessarily the easiest client.

- TIMELINESS
- RESPONSIVENESS
- BOOKKEEPING OWNERSHIP
- RECORD QUALITY
- DIGITAL CONFIDENCE
- COMPLEXITY

COMPLEXITY ↑ · INTERVENTION →

TECHNICAL, SELF-RUNNING
Complex work, low chasing

COMPLEX AND HANDS-ON
Highest cost to serve

SIMPLE AND RELIABLE
Light touch, protect it

SIMPLE BUT DEMANDING
Small fee, big effort

WORKBOOK ACTION

Assess five real clients

CLIENT	LIGHT	SUPPORTED	MANAGED	HIGH

COMPLEXITY DRIVES THE TECHNICAL WORK. BEHAVIOUR DRIVES THE OPERATIONAL EFFORT.

Not every client should work the same way

Match the service model to the client’s behaviour, capability and complexity.

DIY
Client keeps the records
You review, advise and submit.
Works when habits are already reliable.

DIWM
Do it with me
Shared ownership with agreed checkpoints and coaching.

DIFM
Do it for me
You own the bookkeeping. Priced for the work, not the filing.

COMPLEX
Managed
Multiple sources or trades. Named owner and a defined route.

THE DECISION TEST

CAN THEY?	WILL THEY?	SHOULD THEY?
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CAPABILITY DOES NOT
AUTOMATICALLY EQUAL OWNERSHIP.

WORKBOOK ACTION

Same five clients. Current model → better model.

CLIENT	CURRENT	BETTER	WHAT CHANGES?

Price the behaviour, not just the filing

The quarterly update may be standard. The work required to get there rarely is.

WHAT ARE YOU REALLY PRICING?

Records

Support

Chasing

Clean-up

Review

Complexity

Comms

Submission

WORKBOOK ACTION

One client: what you expected against what it took.

ELEMENT	EXPECTED	ACTUAL
Time		
Chasers		
Correction		
Review		
Support		
Senior intervention		

THEN CHOOSE ONE

☐ Keep

☐ Improve process

☐ Change scope

☐ Review fee

☐ Reset both

DON'T PRICE FOUR FILINGS. PRICE A YEAR-ROUND SERVICE.

Your deadline cannot be the client's deadline

Create the space to chase, fix and review before the pressure arrives.

2

RESET IT



DON'T MANAGE THE DEADLINE. **MANAGE THE LEAD-UP TO IT.**

WORKBOOK ACTION

Write your MTD working agreement

PROMPT	OUR AGREEMENT
What	
When	
Where	
If late	

STATUS AT A GLANCE

Green

 — on track

Amber

 — at risk

Red

 — late

Agree what each colour triggers before the quarter starts, not during it.

Who does what — and when?

Clear ownership prevents chasing, duplication and work falling between the gaps.

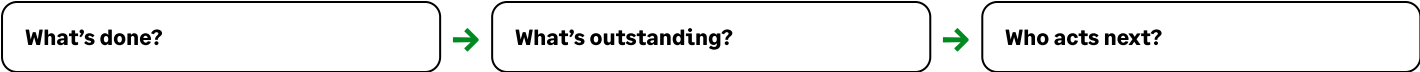
MARK EVERY STAGE: ONE OWNER, AND ONLY ONE

O OWNS S SUPPORTS A AUTOMATED

LANE	Capture	Complete	Books	Chase	Queries	Except.	Review	Submit	Close
Client									
Technology									
Bookkeeper / process owner									
Accountant / reviewer									

ONE TASK. ONE CLEAR OWNER.

THE HAND-OFF STRIP — SAY THIS OUT LOUD AT EVERY CHANGE OF HANDS



Bridge or build?

Did your solution simply get the filing done — or improve the whole year’s workflow?

BRIDGE

Keep an effective existing records process and create an MTD route from it.

BUILD

Create a stronger regular digital bookkeeping process the client works in.

SIMPLIFY

Remove technology and process complexity that no longer earns its place.

DON'T CHOOSE TECHNOLOGY TO SATISFY MTD.
CHOOSE IT TO REDUCE THE WORK MTD CREATES.

WORKBOOK ACTION

SINCE GOING LIVE, IS IT...

- Easier for the client
- Information arrives earlier
- Better data quality
- Less chasing
- Easier correction
- Better collaboration
- Faster review
- Easier year-end

Overall effort

YES	PARTLY	NO

THE REAL TEST

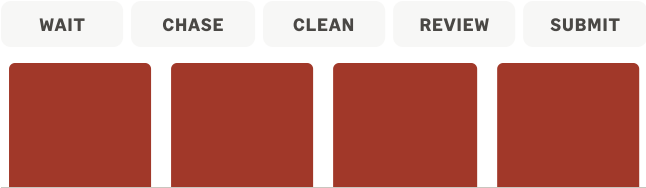
Will this make year-end easier?

Don't run MTD quarterly. Run your clients regularly.

3 RUN IT

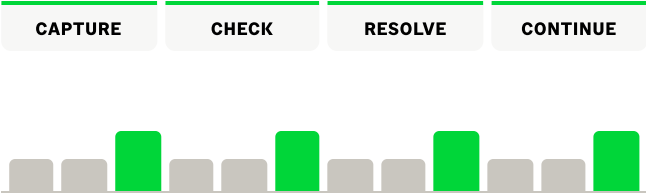
The easiest quarterly update is the one that is already mostly done.

DEADLINE MODEL



Four spikes. All of the work in the last two weeks.

REGULAR RHYTHM



Small and often. The quarter becomes a checkpoint.

THE QUARTER SHOULD BE A CHECKPOINT — NOT A CLEAN-UP PROJECT.

WORKBOOK ACTION

Set the rhythm by client segment

SEGMENT	CONTACT RHYTHM	WHO ACTS
Light touch		
Supported		
Managed		
High intervention		

FROM PRACTICE

"Little and often. The quarter stopped being an event."

3 RUN IT

REGULAR

CAPTURE



CHECK



RESOLVE



CONTINUE

QUARTERLY

Q1 • Review → Submit

Q2 · Review → Submit

Q3 · Review → Submit

Q4 • Review → Submit

ANNUAL

ADJUSTMENTS



FINAL REVIEW



MTD TAX RETURN

FOUR QUARTERLY UPDATES SHOULD NOT MEAN FOUR YEAR-ENDS.

WORKBOOK ACTION

What can move earlier? What are you repeating every quarter without need?

REGULARLY

QUARTERLY

ANNUALLY

MTD doesn't live in isolation

Capacity problems happen when too many good processes compete for the same time.

PRACTICE CAPACITY CALENDAR

■ NORMAL ■ TIGHT ■ HIGH RISK

■ WORKBOOK ACTION

WORKLOAD

A M J J A S O N D J F M

MTD

VAT

Payroll

Accounts

Corporation Tax

Personal Tax

Client reviews

Holidays / absence

Other

Mark each month for your own practice. April to March.

Our highest-risk month

What moves earlier?

Which clients need earlier intervention?

What can be automated, delegated or rescheduled?



Tip: mark the calendar with the team in the room. The month you disagree about is usually the risk.

DON'T PLAN MTD IN AN MTD CALENDAR. PLAN IT IN THE PRACTICE CALENDAR.

Cleaner data. Less downstream work.

Every problem solved at source is a problem you don't have to review later.

POOR INPUT

MISSING

FIND

CHASE

WAIT

CORRECT

RE-REVIEW

BETTER INPUT

COMPLETE ENOUGH

CHECK

RESOLVE EXCEPTION

CONTINUE

POOR DATA **CREATES WORK MORE THAN ONCE.**

YOUR MINIMUM DATA STANDARD

COMPLETE	CURRENT	CONSISTENT	EXPLAINABLE	ACCESSIBLE
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WORKBOOK ACTION

DATA SOURCE

Bank

Sales

Receipts

Property / agent

Other income

Client explanations

Fix the source, not just the symptom.

CURRENT ROUTE	RELIABLE?	MANUAL?	BETTER ROUTE

Don't just send reminders. Change behaviour.

The goal isn't more communication. It's fewer prompts that actually work.

WORKBOOK ACTION

Redesign one client communication using all six prompts.

WHAT	WHEN	WHERE
WHY	WHAT IF	CHANNEL

MAKE THE ACTION CLEARER, NOT THE REMINDER LOUDER.

COMMUNICATION RHYTHM

SET

NUDGE

SIGNAL

INTERVENE

RESET

MATCH THE APPROACH TO THE BEHAVIOUR

Proactive Self-Server

Cooperative Delegator

Annual Bag-of-Records

Resistant / Avoidant

Right-sized review

Review what matters now — without turning every quarter into a year-end.

AN ISSUE APPEARS. THEN WHAT?

Does it materially affect the records, or block the process?

FIX NOW

Is it unusual, risky or significant?

INVESTIGATE

Does it need remembering later?

FLAG FOR LATER

Would more work now be disproportionate?

DON'T PERFECT

SIGNIFICANCE	RISK	TIMING
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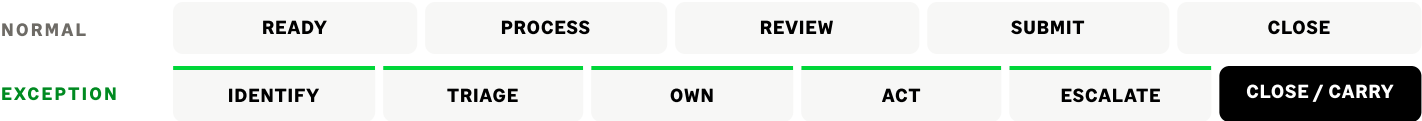
WORKBOOK ACTION

Define your quarterly review standard

GOOD REVIEW IS NOT ABOUT CHECKING EVERYTHING. IT IS ABOUT NOTICING WHAT MATTERS.

No heroics: design the exception route

When the normal process breaks, everyone should already know what happens next.



Green — resolve in the workflow Amber — intervene Red — escalate

WORKBOOK ACTION				
EXCEPTION	TRIGGER	FIRST ACTION	OWNER	ESCALATE WHEN
Late client				
Missing information				
Poor records				
Software / access				
Unexpected complexity				

THE AIM ISN'T TO ELIMINATE EXCEPTIONS. IT IS TO STOP EXCEPTIONS RUNNING THE PRACTICE.

Submit. Confirm. Close.

Finish this quarter properly before the next one begins.

SUBMIT

CONFIRM

RECORD

CARRY FORWARD

RESET

REGULAR RHYTHM

CLOSE-DOWN CHECKLIST

☐ Submitted

☐ Status confirmed

☐ Client notified

☐ Queries resolved

☐ Outstanding items recorded

☐ Carry-forward owner assigned

☐ Client action agreed

☐ Internal status updated

☐ Next activity scheduled

☐ Recurring exception identified

TELL THE CLIENT THREE THINGS

DONE

OUTSTANDING

NEXT

CARRY-FORWARD RULE

WHAT

WHY

WHO

WHEN

SUBMITTED IS NOT THE SAME AS CLOSED.

Automate the predictable. Keep judgement human.

Use technology to remove repetition, surface exceptions and give people time to think.



AUTOMATE

Capture · Rules · Reminders · Status



SURFACE

Missing · Anomalies · Exceptions · Risk



JUDGE

Question · Decide · Explain · Advise · Own

TECHNOLOGY	CAPTURE	COMPARE	PROMPT	PRIORITISE	DRAFT
PEOPLE	QUESTION	DECIDE	EXPLAIN	ADVISE	TAKE RESPONSIBILITY

WORKBOOK ACTION

Choose one activity to simplify or automate before the next quarter

IN THIS ORDER

SIMPLIFY

STANDARDISE

AUTOMATE

AUTOMATE THE ROUTINE. SURFACE THE UNUSUAL. **APPLY JUDGEMENT WHERE IT MATTERS.**

If it happens every quarter, it isn't an exception

Stop solving the same problem twice.

SPOT

LOG

UNDERSTAND

FIX

OWN

CHECK NEXT QUARTER

- CLIENT
- PROCESS
- TECHNOLOGY
- SERVICE MODEL

MTD EXCEPTIONS LOG						
ISSUE	RECURRING?	ROOT CAUSE	TEMPORARY FIX	PERMANENT CHANGE	OWNER	BY WHEN

FIRST TIME
SOLVE IT

SECOND TIME
NOTICE IT

THIRD TIME
CHANGE SOMETHING

Did this quarter make commercial sense?

Measure the work you delivered, not just the fee you charged.

CLIENT FEE

- CHASING
- REWORK
- SENIOR INTERVENTION
- EXTRA SUPPORT
- OUT-OF-SCOPE WORK

REAL MARGIN

WORKBOOK ACTION

ONE CLIENT, ONE QUARTER

	EXPECTED	ACTUAL
Time		
Chasing		
Rework		
Senior input		
Out-of-scope work		
Recovery		

WHERE DID THE GAP COME FROM?

☐ Price

☐ Process

☐ Behaviour

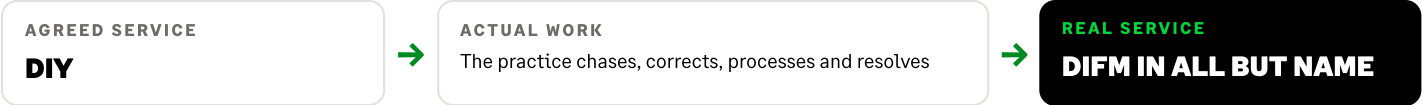
☐ Service model

☐ Complexity

DON'T ASK ONLY "WAS IT PROFITABLE?" ASK "WAS IT SUSTAINABLE?"

When the service model stops working

Don't keep delivering one service while charging for another.



NAME THE SERVICE YOU ARE ACTUALLY DELIVERING.

THE RESET LADDER — START AT THE TOP



WORKBOOK ACTION

PROMPT

THIS CLIENT

Original model

Actual model

What changed?

First action

New model

THE REAL TEST

If you onboarded this client today, knowing what you know now, would you offer the same service at the same price?

One improvement. Every quarter.

Small changes compound when you stop carrying the same friction forward.

RUN	NOTICE	CHOOSE	IMPLEMENT	STANDARDISE	BETTER NEXT QUARTER
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OUR ONE IMPROVEMENT

What happened?

Why?

What will be different?

Owner / by when

How will we know?

STOP	SIMPLIFY
AUTOMATE	CHANGE

5 mins

x

50 obligations

x

4 quarters

=

16+ hours

DON'T CARRY A KNOWN PROBLEM INTO THE NEXT QUARTER UNCHANGED.

The next cohort is not just more of the same

Build the habit before the obligation.

WAIT FOR MANDATION

CONTACT

EXPLAIN

CHOOSE

CHANGE BEHAVIOUR

FIX PROBLEMS

FILE

Everything changes at once.

BUILD THE HABIT FIRST

IDENTIFY

SEGMENT

AGREE MODEL

PRACTISE

CORRECT

REPEAT

The process is already familiar.

DON'T USE THE FIRST MANDATED QUARTER TO TEACH THE CLIENT HOW TO WORK DIFFERENTLY.

WORKBOOK ACTION

READY NOW

NEEDS A HABIT

NEEDS SUPPORT

NEEDS A DIFFERENT MODEL

CLIENT / SEGMENT

CURRENT RECORDS

BEHAVIOUR

FUTURE MODEL

HABIT TO BUILD

START BY

Clients x obligations x four quarters = the demand you are designing for

Quarterly updates are not the finish line

Design the quarters so the annual finish becomes easier too.

REGULAR RECORDS

Q1

Q2

Q3

Q4

ANNUAL FINISH

MTD TAX RETURN

QUARTERLY WORK SHOULD REDUCE YEAR-END WORK — NOT SIT ON TOP OF IT.

YEAR-END READINESS

☐ Records up to date

☐ Routine corrections resolved

☐ Explanations obtained while recent

☐ No unnecessary re-keying

☐ Gaps identified

☐ Outstanding issues visible

☐ Carry-forward items known

☐ Starts from reliable records

THE DUPLICATE-WORK TEST — ARE WE...

Rechecking?

Re-keying?

Asking old questions?

Rebuilding known reconciliations?

The goal isn't to finish year-end twelve months early. It is to stop starting it from scratch.

5 SCALE IT

☐ ☐ ☐ ☐ ☒

INVEST CAPACITY

☐ Client service ☐ Margin ☐ Selected new clients ☐ Advisory
☐ Team development ☐ Systems ☐ Peak resilience ☐ Fewer hours

BUILD

CAPACITY ISN'T AUTOMATICALLY GROWTH. CAPACITY GIVES THE PRACTICE A CHOICE.

Choose the right Sage route for the client

Start with how the client works. Then choose the technology that makes that work easier.

CLIENT FIRST. WORKFLOW SECOND. TECHNOLOGY THIRD.

STEPS 1-2 CLIENT RECORDS LAYER	ACCOUNTSPREP	SOLE TRADER FREE	SOLE TRADER PAID	ACCOUNTING START	ACCOUNTING STANDARD	ACCOUNTING PLUS	SAGE 50
BEST SUITED TO	Practice-prepared records	Simple sole traders	Sole traders needing more	Light bookkeeping	Regular activity	Complex, multi-currency	Desktop needs
BOOKKEEPING OWNER	Practice	Client	Client, supported	Shared	Shared	Shared or practice	Practice or in-house
SERVICE MODEL FIT	DIFM	DIY	DIY / DIWM	DIWM	DIWM / DIFM	DIFM	Managed

KEEP RECORDS Mark the routes your practice actually uses — the records they produce are the input to everything on the facing page.



STEPS 3-4 Once the client is on the right record-keeping route, Sage for Accountants helps you review the period, manage the MTD obligation and complete the quarterly process — **see facing page**.

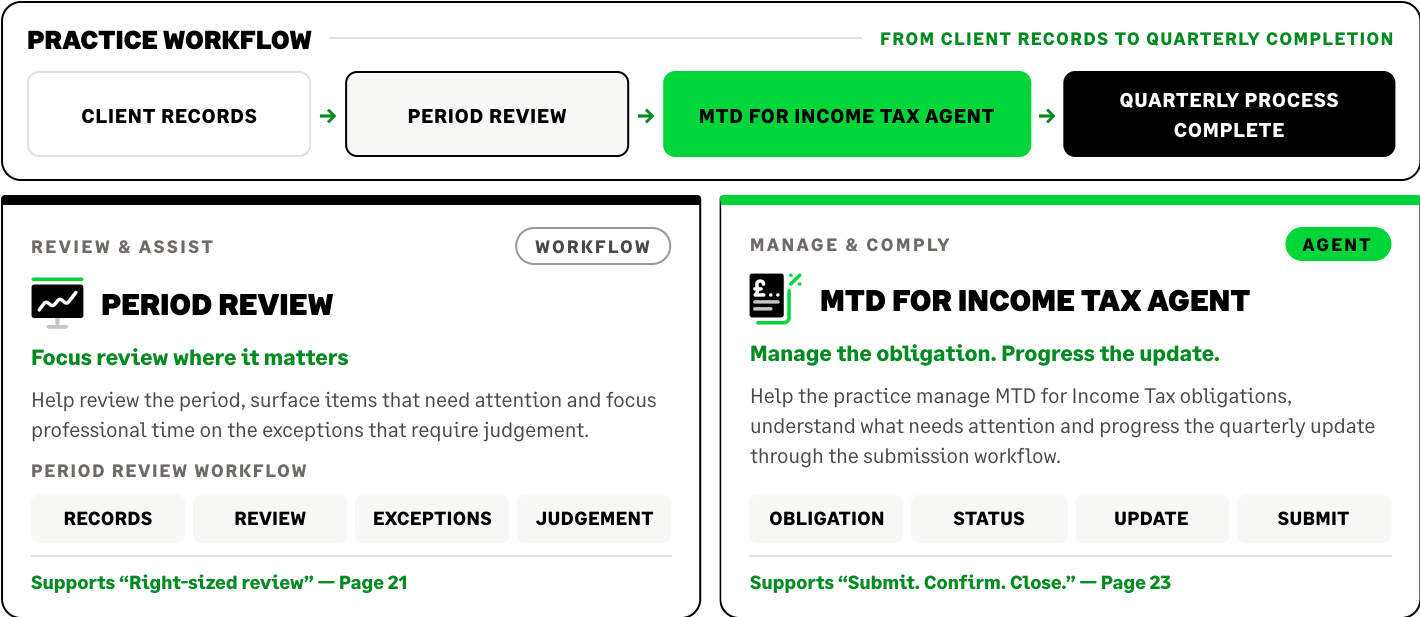
The best solution is not the one with the most features. It is the one that removes the most friction for that client and your practice.

Then connect the practice workflow

■ YOUR SAGE TOOLKIT

The client route decides how the records are made. These help your practice review and complete the work.

STEPS 3-4 Once the client is on the right record-keeping route, Sage for Accountants helps your practice review the period, manage the MTD obligation and complete the quarterly process.



THE CLIENT SOLUTION DECIDES HOW THE RECORDS ARE MADE. **PERIOD REVIEW AND THE MTD FOR INCOME TAX AGENT HELP THE PRACTICE REVIEW AND COMPLETE THE WORK.**

Beyond MTD: one connected toolkit for your practice

MTD is one workflow. The same connected capabilities create capacity across the practice.

■ YOUR SAGE TOOLKIT

SAGE FOR ACCOUNTANTS

THE CONNECTED WAY TO RUN EVERY STAGE

COPILOT · AGENTS · AUTOMATION · CONNECTED DATA

01 WIN & ONBOARD
Choose the right service route

- Segment by behaviour
- KYC/AML and authority
- Scope, price, agreement

Onboarding ·
KYC/AML ·
GoProposal

RATE ☐☐☐

02 MANAGE
Run the whole portfolio

- Every obligation visible
- Owner, route, blocker
- Tasks and escalation

Client Management

RATE ☐☐☐

03 CAPTURE & PROCESS
Complete records, on time

- Structured requests
- Completeness checks
- Batch or continuous

AutoEntry ·
AccountsPrep · Data capture

RATE ☐☐☐

04 BOOKKEEP & PAY
Keep records current

- Bank feeds and reconciliation
- Quality at source
- Capture-check-resolve

Accounting · Sole Trader · Payroll

RATE ☐☐☐

05 REVIEW & COMPLY
Focus judgement where it matters

- Right-sized review
- Correct, carry, approve
- Validate, submit, close

Period Review

MTD for Income Tax Agent

RATE ☐☐☐

06 FORECAST & PLAN
Plan with current data

- Cash-flow visibility
- Budgets and scenarios
- Practice and client planning

Cash flow ·
Budgeting ·
Scenarios

RATE ☐☐☐

07 REPORT & ADVISE
Turn insight into action

- Reporting and analytics
- Proactive client conversations
- Actions, follow-up

Reporting ·
Analytics · Insight

RATE ☐☐☐

MTD FOR INCOME TAX: ONE CAPACITY WORKFLOW

Filing is the final step. Capacity is created upstream.

IDENTIFY
Clients and obligations known

VISIBILITY

→

ACTIVATE
Authority, access and route set

READINESS

→

CAPTURE
Evidence arrives reliably

COMPLETENESS

→

MAINTAIN
Records stay current

CONTINUITY

→

REVIEW
Resolve exceptions, decide

PERIOD REVIEW

→

SUBMIT
Validate, send, confirm

MTD FOR INCOME TAX AGENT

→

CLOSE
Retain evidence, notify, schedule

CARRY-FORWARD

RATE EACH STAGE 1 · Working well 2 · Could improve 3 · Capacity drain ONE PRIORITY _____ OWNER _____ FIRST ACTION _____

CAPACITY IS WON BEFORE FILING — THROUGH READINESS, CURRENT RECORDS AND EXCEPTION-LED REVIEW.

34 | YOUR SAGE TOOLKIT

More practical help when you need it

Two places to bookmark as you keep improving your MTD approach.

MAKING TAX DIGITAL

sage.com/MTDAccountants

Practical MTD guidance, resources, support and Sage solutions for accountants and bookkeepers.



- STAY INFORMED
- GET PRACTICAL HELP
- EXPLORE SOLUTIONS

AMPLIFY YOUR IMPACT

sage.com/amplify-your-impact

Ideas, tools and resources to help you create more capacity and make a greater impact.

- CAPACITY
- TECHNOLOGY
- CLIENTS
- PRACTICE

MTD MAY HAVE STARTED THE CONVERSATION. AMPLIFY YOUR IMPACT HELPS YOU DECIDE WHAT COMES NEXT.

COME BACK TO THIS PLAYBOOK

REVIEW IT

After each quarter

RESET IT

When a client stops fitting

RUN IT

When workload builds

REFINE IT

When friction repeats

SCALE IT

Before the next cohort

Talk to Sage

■ YOUR SAGE TOOLKIT

Sometimes the quickest way forward is to talk it through.

BOOK A PRACTICE SUCCESS MANAGER CONVERSATION

Talk through your client mix, MTD workflow, technology and where you want to create more capacity.



SCAN TO BOOK

■ BRING YOUR PLAYBOOK

The friction

The client segment

The outcome I want

NEED PRODUCT SUPPORT?

PHONE

0191 479 5999 Option 3

MTD

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BRING THE PROBLEM. WE CAN HELP YOU EXPLORE THE ANSWER.



FROM COMPLIANCE TO CAPACITY

DON'T REPEAT THE LAST QUARTER. **BUILD A BETTER NEXT ONE.**

Better client habits. Better workflows. More capacity for
what comes next.

READY TO PUT IT INTO PRACTICE?



Book a conversation
with a Sage Practice
Success Manager

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REVIEW IT → RESET IT → RUN IT → REFINE IT → SCALE IT

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