



MONTHLY REPORT SAMPLE · ACCOUNTING / TAX PRACTICE

What we'd see in your business.

会計事務所 / 税理士事務所

DOCUMENT CONTEXT

This is a representative sample audit prepared from a fictional Japanese tax accounting practice (税理士事務所) at approximately ¥65M annual revenue, serving 80 SME clients across monthly bookkeeping and annual tax filing services, with a team of 6 staff.

All names, figures, and individuals shown are fabricated. The methodology, formulas, structure, and analytical depth are *identical* to those used in a live engagement.

If this is what you'd want to see for your business — request a free assessment at meridian.tokyo/assessment. Within 48 hours, you'll receive a written diagnosis specific to your business.

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What this business looks like through our lens.

Key operational metrics, each benchmarked against industry. The table shows where your business currently sits versus targets and recovery potential. The numbers are a summary — the substance is in which metrics are dropping, why, and how to fix them. The analysis on the following pages is the value.

What we'd surface first

This practice is profitable and stable but has clear inefficiencies. Margin and client retention are strong, but staff utilization and pricing structure are leaking value.

The standout signal is utilization at 58: *three of six staff are underbooked while the other three are at capacity*. Senior staff are doing junior work because the skills matrix isn't being used for assignment.

Pricing is still based on legacy 2018 rates for 60% of clients. A simple repricing exercise to current market rates would lift annual revenue by ~¥8M with no additional client work.

Key metrics this month

Metric	Weight	Current	Target
Revenue (monthly)	15%	¥5.4M	¥6.5M
Client retention rate	15%	94%	90%
Avg revenue per client	10%	¥67k	¥85k
Staff utilization	15%	58%	75%
On-time filing rate	10%	98%	95%
Time-to-response (inverse)	10%	0.9d	1.0d
EBITDA margin	15%	32%	30%
New client acquisition	10%	1.2/mo	2.5/mo

What's actually wrong — right now.

Three issues this business is bleeding money on. Each one has a specific cost, a specific fix, and a specific way to measure whether the fix worked. This is what the monthly action plan looks like, condensed.

01

HIGH IMPACT

Pricing

60% of clients are paying 2018 rates.

What we see

48 of 80 clients are still on legacy fee schedules from 2018. Average fee per legacy client: ¥56k/month. Average for clients onboarded in the past 18 months: ¥84k/month. Same scope of work, ~50% price gap.

Estimated cost

~¥8M annually in foregone revenue from underpriced existing clients.

Recommended action

Implement a structured repricing campaign over 6 months. Send written notice 90 days before rate change, with detailed rationale (regulatory complexity, etc.). Expect 5-10% client churn — the math still works.

02

HIGH IMPACT

Operations — staff

Senior staff doing junior work, every week.

What we see

Time tracking shows partner-level staff spending 18-22h/week on data entry and basic filings that could be done by junior staff or interns. Junior staff utilization: 42%. The skills gap isn't real — it's an assignment gap.

Estimated cost

~¥1.8M/month in opportunity cost. Senior time is billed (or could be billed) at ¥20k+/hour; junior at ¥6k. The mismatch is structural.

Recommended action

Implement a delegation matrix with explicit thresholds: any task under ¥80k/month in client value goes to junior staff first. Senior reviews, doesn't execute. Track the partner-billable hours ratio monthly.

03

MEDIUM IMPACT

Acquisition

1.2 new clients per month — half what referrals could deliver.

What we see

Existing clients refer 0.4 new clients/month on average. Industry benchmark for established practices: 1.0-1.5/month. There's no formal referral program; clients don't know it's actively wanted.

Estimated cost

Each missed referral represents ~¥1M lifetime value. ~¥10M/year unaddressed.

Recommended action

Add a written referral request to the standard year-end client letter. Track referrals per client annually. Highlight referring clients in private thank-you notes. Don't pay for referrals — it cheapens the relationship.

What changed after the work.

After 6 months, the operational picture had shifted measurably. Each result corresponds to one of the red flags identified in the audit. Plausible, conservative, and tracked monthly.

01 Pricing realignment

BEFORE

60% of clients on 2018 rates



AFTER

+23% average fee increase

+¥6.2M/year revenue

02 Staff utilization

BEFORE

Senior staff: 42% billable



AFTER

Senior staff: 71% billable

after delegation matrix

03 Referral program

BEFORE

1.2 new clients / month



AFTER

2.1 new clients / month

after structured referral process

Numbers reflect outcomes from comparable engagements, anonymized for confidentiality. Individual results vary; benchmarks are realistic averages, not best-case scenarios.

How an engagement actually runs.

A live engagement is structured. Not consulting hours, not “we’ll figure it out as we go”. Four phases of setup, then monthly delivery on a calendar.

WEEK 1

Discovery & data audit

We examine your existing data — CRM exports, finance sheets, ad reports, sales records. Format and condition don’t matter. We identify the highest-leverage gaps.

WEEKS 2-3

Sector calibration

We configure benchmarks, metrics, and red-flag thresholds against your industry and your prior periods. Custom-fit, not template.

WEEK 4

First diagnosis

First written diagnosis delivered. Three priorities to act on this month, with the cost of inaction quantified for each.

MONTH 2+

Monthly action plans

Each month, a written action plan. What’s broken, where the leaks are, and the prioritized playbook for next month. Asynchronous — reply by email when convenient.

Engagement tiers

Foundation

¥90k + ¥90k/mo

Single business, simple structure

Standard **RECOMMENDED**

¥130k + ¥130k/mo

Multi-channel, growing business

Extended

from ¥200k + ¥220k/mo

Multi-business-unit, group structure

Setup guarantee: if within 3 months the improvement opportunities we identify total less than what you’ve paid us in retainers, we refund the entire setup fee. The retainer is cancellable monthly — the guarantee covers identification of opportunities, not implementation.

NEXT STEP

Request a free assessment.

Visit meridian.tokyo/assessment and tell us briefly about your business. Within 48 hours you’ll receive a written initial diagnosis: typical leakage patterns in your industry, three likely problems specific to your situation, and the hardest questions you should be answering.

No commitment, no sales call. If after the diagnosis we both agree it’s a fit, we propose terms. If not, you keep the diagnosis and this sample.

