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How to get ahead of the accounts pack

SARAH RICHARDSON

AS MANAGING director of bookkeeping service provider Boogles Ltd Lisa Newton looks at her own firm's accounts as well as a growing number of other people's. She established her business aged 23 in 2004, in the same month she graduated from City University with a first-class honours degree in accountancy with management and a Masters in investment management. Now she manages a team of 20 and does bookkeeping, treasury management, marketing, website development and strategic planning.

"I travel a lot with business to networking events and road shows — we are promoting Boogles bookkeeping franchise opportunity at the moment," she explains.

She has already won a Young Entrepreneur Award from the Make Your Mark campaign in 2007 — and last year when Boogles won an enterprising business award. Lisa started on the path to success when she decided to start training as an accounting technician with the Association of Accounting Technicians (AAT) at 16, alongside her A-level studies.

"I heard about [the qualification] from my school careers adviser. I wanted to get the ball rolling and I thought it would give me a good grounding in accountancy," she recalls. "I did AAT level 2 as a day release alongside my A-levels because my college didn't offer A-level accountancy so it was my only option. I wanted to study something practical so I had a

trade to fall back on, so the AAT was the ideal choice for me."

While many AAT students receive support and encouragement from your training provider — often an employer — Lisa put herself through AAT. "But because I was still in full-time education, the college paid for the exam fees and membership of the AAT," she says.

Lisa took a break at the end of year 3 when she moved to London and started her degree. "I didn't have the time to finish level 4 [at this stage] but I was motivated to finish because I knew I only had three papers left and I wanted my certificate. I also knew they were changing the syllabus and if I'd left it I'd have had more papers to sit."

"I thought about all the long nights I'd spent on Level 4 and the time and the

money and made up my mind to get it finished."

Lisa insists there was an upside to taking an external qualification alongside her university course.

"Thanks to three years of studying the AAT before university, I found my degree very easy," she says. "I still went out a lot and held down three part-time jobs during term time." She recommends AAT training to other people "as the most practical and useful accounts-based qualification out there."

"I don't think anything else can beat it," she says. "AAT teaches you what you need to know right from scratch. Thanks to having debits and credits drummed into me, I can make journal entries if I need to and know if a computerised programme trial balance seems 'wrong'."

"I have ACCA level 1 and part of level 2 but I didn't continue with it as the business started to take off. I see myself as an entrepreneur rather than a chartered accountant. The off-putting part of ACCA is that you have to do three years' shadowed work experience — I wanted to run my own business and help businesses at a basic level."

While Lisa is clearly an exceptional student — she used to play Monopoly with herself to understand debits and credits — she sees an AAT qualification as a standard by which to judge others.

"When someone has the AAT they know what they are doing," she says. "When recruiting for franchisees, our preference will be for AAT members." university@york.ac.uk, www.boogles Ltd.com, www.educatelondon.co.uk.

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