



SuiteFiles

# The People First Firm Playbook:

How to Attract, Retain & Empower  
a High-Performing Team

# Introduction

## Why People-First Matters More Than Ever

In a world of increasing complexity, automation, and digital disruption, one thing remains constant: **people power performance**. While technology can streamline operations and sharpen your competitive edge, it's your people who drive real growth, innovation, and client success.

Firms that prioritize their people—creating environments where individuals feel valued, supported, and empowered—**consistently outperform** those that don't. In fact, research shows that companies with highly engaged teams are **21% more profitable** and experience **59% less turnover** than those without.

So, what does it actually mean to be a people-first firm? It's not about beanbags and free snacks. It's about creating a workplace where your team feels trusted, heard, and inspired to do their best work. It's about removing friction, reducing burnout, and making work more human again.

This playbook is your guide to building and sustaining that kind of culture. Inside, you'll find:

- ✓ The core pillars of people-first leadership
- ✓ Practical ways to attract and retain top-tier talent
- ✓ How to reduce admin overload so your team can focus on high-value work
- ✓ Real-world examples of firms already doing it well

Whether you're leading a small team or shaping strategy for a growing firm, this guide will help you **build a business where people thrive—and results follow**.

Let's dive in.



## CHAPTER 1

# The Pillars of a People-First Firm

Being a people-first firm isn't just a feel-good slogan—it's a strategic advantage. When you put your people at the center of your business, you unlock higher engagement, stronger performance, and greater loyalty. But what does that actually look like in practice?

It starts with building your business on four key pillars that shape how people experience work every day: trust, transparency, autonomy, and purpose.

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## 1. Trust

Trust is the foundation of every high-performing team. It means giving your people the benefit of the doubt, empowering them to make decisions, and creating an environment where mistakes are viewed as opportunities to learn—not reasons to micromanage.

When people feel trusted, they take ownership. They solve problems faster, bring forward better ideas, and hold themselves (and each other) accountable to higher standards. It's the difference between a team that shows up for the paycheck and one that shows up with purpose.

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## 2. Transparency

People want to feel like they're in the loop. Transparency doesn't mean sharing every spreadsheet and boardroom decision—it means being open about the "why" behind your firm's direction, changes, and expectations.

Transparent communication builds alignment. It helps teams understand not just what they're working on, but why it matters, how success is defined, and what role they play in achieving it. It fosters a culture of honesty, reduces workplace politics, and builds trust from the top down.

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## 3. Autonomy

Nobody likes being micromanaged. People want the freedom to do their jobs well, in a way that works for them. A people-first firm gives team members the tools, support, and clarity they need to succeed—and then gets out of their way.

Autonomy doesn't mean chaos. It means setting clear expectations and then trusting your team to deliver. It's about focusing on outcomes over input, and giving people the flexibility to work in ways that align with their strengths.

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## 4. Purpose

Great teams aren't just productive—they're mission-driven. Purpose gives people a reason to care beyond the task list. It connects day-to-day work to a bigger goal, whether that's helping clients succeed, supporting a cause, or driving change in your industry.

People-first firms don't just talk about purpose—they embed it into everything they do. They hire for values, celebrate impact, and create roles where individuals can see how their work contributes to the bigger picture.

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Together, these pillars create the conditions for high performance, low turnover, and a culture where people actually want to stay and grow. In the next chapter, we'll explore how to bring these principles to life through culture—starting with how to attract the right people in the first place



## CHAPTER 2

# Building a Culture That Attracts Top Talent

Hiring isn't just about filling a seat—it's about attracting the right people who will thrive in your team, align with your values, and help move your firm forward. And while competitive salaries matter, **culture is what seals the deal**—and keeps people around long after the job offer is accepted.

A strong culture isn't created by chance. It's designed intentionally and reinforced daily. In this chapter, we'll explore what modern talent is looking for and how you can build (and showcase) a culture that stands out in a competitive market.

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## What Today's Talent Actually Wants

Spoiler: It's not ping pong tables or office snacks. Talented professionals—especially in knowledge-based industries—are looking for:

- ✓ **Meaningful work**
- ✓ **Flexible work arrangements**
- ✓ **Opportunities for growth**
- ✓ **A supportive, inclusive environment**
- ✓ **A sense of belonging and purpose**

In fact, a Deloitte study found that **94% of employees would stay at a company longer if it invested in their learning and development**. People want to work somewhere that sees them as more than a resource.

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## Define Your Culture, Then Live It

If your culture isn't clear internally, it won't resonate externally. Start by defining your values and what they look like in action. Are you client-obsessed? Do you champion learning? Is work-life balance non-negotiable?

Once your values are defined, **weave them into everything**—from job descriptions and interview questions to how you onboard new hires and recognize achievements. Culture isn't what you say—it's what you do, consistently.

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## Show, Don't Tell: Employer Branding in Action

The firms that attract top talent don't just talk about their culture—they **show it**:

- Use your careers page and social channels to give real glimpses into life at your firm
- Share employee spotlights, team wins, and behind-the-scenes moments
- Let your people tell the story—authenticity always wins

Top candidates are evaluating your firm from the outside long before they ever apply. Give them a reason to say, “I want to be part of that.”

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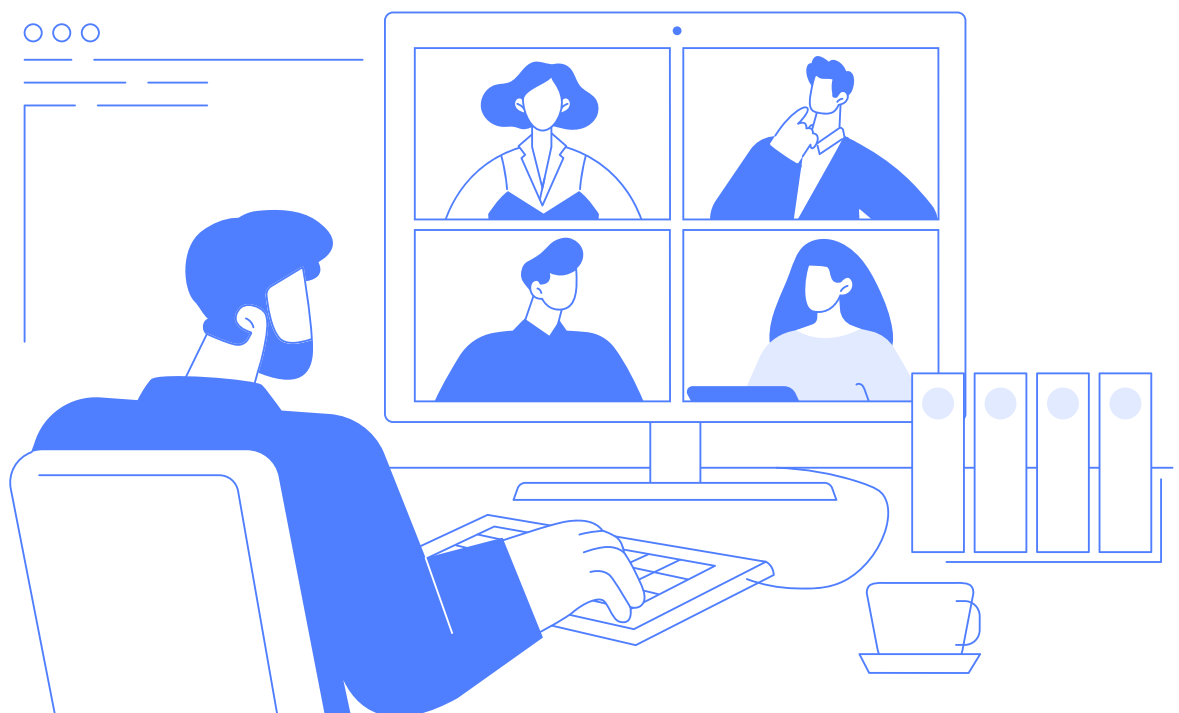
## Culture Across Locations: Remote and Hybrid Considerations

In a remote or hybrid world, culture doesn't disappear—it just needs more intention. People-first firms invest in digital rituals, inclusive communication tools, and remote-friendly policies to **ensure every team member feels part of the mission**, no matter where they work from.

Some ways to build culture from afar:

- Virtual team standups and non-work catchups
- Clear expectations for responsiveness and communication
- Equal access to learning, leadership, and recognition—whether remote or in-office

Culture isn't a side project. It's the engine that powers recruitment, retention, and results. In the next chapter, we'll go deeper into how to bring people into that culture—starting with how you recruit and onboard with a people-first mindset.



## CHAPTER 3

# From Hire to Inspire – Rethinking Recruitment & Onboarding

Great teams don't happen by accident—they're built intentionally, from the very first interaction. Recruitment and onboarding are your earliest opportunities to make a lasting impression, and in a people-first firm, those moments are designed to inspire, not just inform.

Hiring isn't just about skills and experience. It's about alignment, energy, and culture fit—because when you hire the right people, your business moves faster, your team gets stronger, and your clients feel the difference.

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### People-First Hiring: Quality Over Speed

In fast-paced firms, it's tempting to rush the hiring process to fill a gap. But people-first firms know that **taking the time to hire right saves time in the long run**. They prioritize clarity, alignment, and inclusivity.

What does that look like?

- Clear job ads that communicate values, not just responsibilities
- Structured interviews that focus on problem-solving and culture fit
- Hiring panels that bring diverse perspectives into the decision
- Respect for the candidate experience at every touchpoint

Remember: recruitment is a two-way street. Candidates are assessing you just as much as you're assessing them.

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### Create a Standout Candidate Experience

A poor hiring experience will repel top talent—even if the job itself is great. People-first firms ensure candidates feel respected, supported, and excited throughout the process.

This means:

- Responding promptly and setting expectations
- Providing feedback (especially after interviews)
- Being transparent about timelines, salary, and next steps
- Offering flexibility in interview scheduling and formats

Even if a candidate isn't hired, they should walk away thinking, "That's a company I'd still recommend."

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## Onboarding as Culture Delivery

Day one is more than a welcome email and a few tech setups. It's your chance to embed someone into your culture, connect them to their purpose, and set the tone for their entire journey with your firm.

People-first onboarding includes:

- A structured plan that spans weeks, not just days
- Introductions to team members across the org—not just the immediate department
- Clear expectations, support, and feedback loops
- Early wins that build confidence and belonging

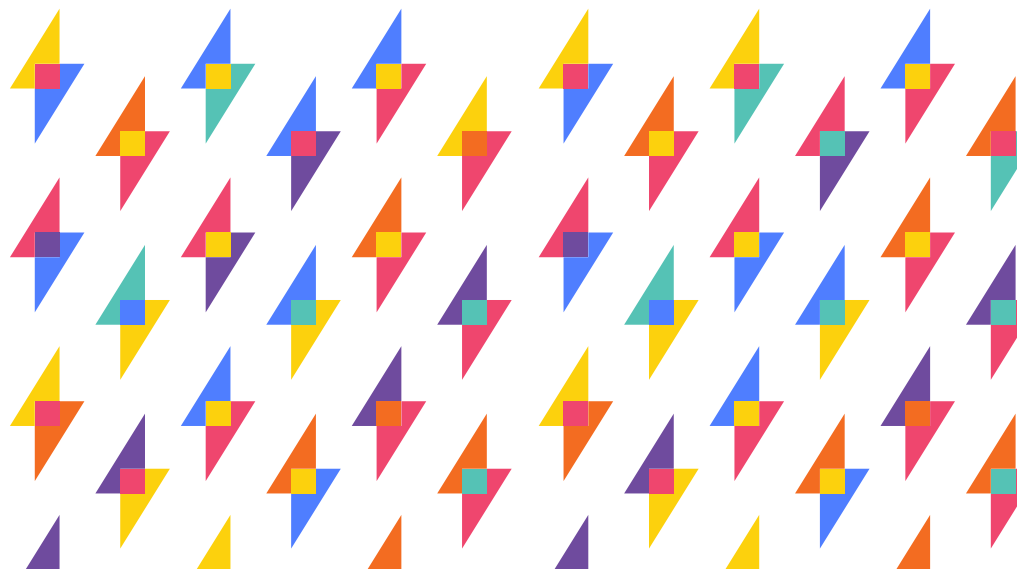
Employees who experience strong onboarding are **69% more likely to stay for three years**. That's not a nice-to-have—that's a competitive advantage.

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## Who's Doing It Well?

- ★ A mid-sized accounting firm in Australia sends personalized welcome kits to each new hire, including handwritten notes from teammates, branded swag, and a breakdown of their first 30 days.
  - ★ A legal practice uses SuiteFiles to automate onboarding tasks—everything from document signing to folder access is pre-set, so new hires feel confident and supported from day one.
  - ★ A remote-first consultancy sets up “day one buddies” and schedules recurring 1:1s with leadership, ensuring new hires feel included, not isolated.
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Your hiring and onboarding process isn't just about filling roles—it's the **first chapter in your culture story**. In the next chapter, we'll explore how reducing admin helps your people focus on work that energizes them, not drains them.





## CHAPTER 4

# Reducing Admin to Empower Your Team

Want to know a surefire way to frustrate your best people? Fill their week with low-value, repetitive tasks that have nothing to do with why they were hired.

Admin overload is one of the most **common—and fixable—threats** to engagement in professional services. It's the silent drain on productivity, creativity, and morale. When your team is stuck chasing signatures, digging for files, or duplicating data across systems, they're not doing the work that energizes them—or delivers value to your clients.

A people-first firm removes that friction. And when you do? Your team moves faster, thinks bigger, and stays longer.

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## The Link Between Admin and Burnout

Admin is more than just annoying—it's exhausting. Research shows that employees spend up to 58% of their workweek on "work about work" (emails, status updates, document wrangling). That's more than half their time spent not doing the work they're actually good at.






Over time, that grind creates:

- ❌ Decreased motivation and sense of impact
- ❌ Higher error rates due to task overload
- ❌ Slower delivery for clients
- ❌ Increased turnover risk

In short: Admin fatigue is real, and it's costing your firm.

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## Common Admin Pain Points in Professional Services

-  Document management chaos (version confusion, scattered storage)
-  Manual data entry across disconnected platforms
-  Endless back-and-forth email threads
-  Delays in approvals, signatures, or job progress
-  Repetitive processes that should be automated

These are the tasks that teams *put up with*—but don't have to.

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## How Reducing Admin Sets Your Team Free

When you streamline and simplify the admin experience, you do more than save time. You send a clear message to your team:

**“We value your time, your focus, and your energy.”**

People-first firms use tools like SuiteFiles to:

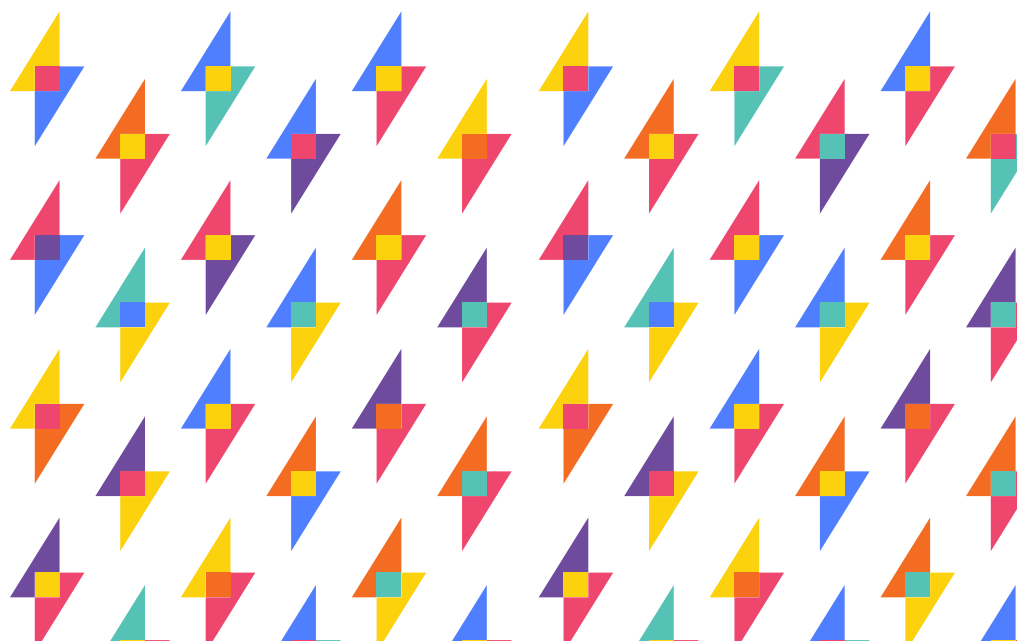
Automate document creation and filing with data pulled directly from systems like Xero Practice Manager

- **Simplify e-signing** with unlimited digital signatures (no third-party tools required)
  - **Keep everything in one place**—no app-switching, no guesswork
  - **Assign and track tasks** so nothing gets missed, and no one gets bogged down
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## Real-World Results

- ✓ FlashPoint Accounting reduced paper, toner, and admin costs by 80%—and created a faster, tidier digital workflow with SuiteFiles at the core.
  - ✓ Resource Accounting saved an average of 5 hours per staff member per week after embracing template automation and integrated file storage.
  - ✓ Kendons Scott MacDonald launched SuiteFiles during a full shift to remote work—and never looked back. Their team now works seamlessly from anywhere, with everything they need in one place.
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Reducing admin isn’t just about efficiency—it’s about empowerment. When your team has the tools and systems to support their best work, they’re happier, more productive, and more loyal.



## CHAPTER 5

# Retention Starts on Day One

You've attracted a great candidate, delivered a strong onboarding experience, and given them tools to thrive—but your work isn't done. In a people-first firm, retention isn't an afterthought—it's a **strategy woven into everyday operations**.

Because here's the truth: if you're not actively working to retain your top people, someone else is already trying to recruit them.

Today's professionals are no longer staying in roles out of obligation. They're staying in workplaces that **value them, grow them, and support them**—personally and professionally. And when firms commit to that? Turnover drops, productivity soars, and clients benefit from a more experienced, stable team.

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## Recognition = Retention

One of the most powerful (and cost-effective) retention strategies? **Recognition**.

Employees who feel their contributions are noticed and valued are:

- **4x more likely** to be engaged
- **5x more likely** to feel connected to company culture
- And significantly more likely to stay

Recognition doesn't have to be grand gestures. It's about consistent appreciation:

- Shoutouts in team meetings
- Personal thank-you notes from leadership
- A quick "I saw what you did—and it made a difference" Slack message

When you make recognition part of the culture, people feel seen, not siloed.

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## Growth Pathways, Not Guesswork

People don't just want a job—they want a path. A people-first firm makes career development visible, actionable, and encouraged from day one.

That means:

- Transparent conversations about growth expectations
- Clear role progression frameworks
- Opportunities to try new projects, skills, or leadership roles
- Access to coaching, learning tools, or mentoring programs

When your team sees a future with your firm, they're more likely to invest in the present.

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## Regular Check-Ins & Feedback Loops

People-first leadership doesn't just happen in annual reviews. It shows up in **weekly one-on-ones, pulse surveys, and meaningful feedback conversations**.

Check-ins shouldn't just be about work updates—they should explore:

- How's your workload?
- What's energizing you right now?
- Where could we support you better?

These moments build trust—and help you solve problems before someone walks out the door.

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## Flexibility and Humanity in Your Policies

Retention isn't all about perks—it's about how people feel. The most effective retention policies are the ones that support the whole person, not just the job description.

That includes:

- Flexible hours or remote work options
- Mental health days or wellbeing stipends
- Parental support and return-to-work pathways
- Space for personal development or volunteering

By creating policies that acknowledge real life, you build loyalty that no salary bump can match.



## CHAPTER 6

# Your People-First Action Plan

Building a people-first firm doesn't happen overnight. But it does start with intention. This action plan is your roadmap for moving from ideas to impact—no fluff, no vague HR speak, just practical steps that will help your team feel more empowered, engaged, and excited to show up every day.

Whether you're a solo decision-maker or leading a growing team, here's how to get started:

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### 1. Audit Your Current Culture

Before you can improve your people experience, you need to understand it.

Ask yourself:

- Are we clear on our values—and are we living them?
- Do our people feel seen, supported, and heard?
- What admin or friction points are draining time and energy?

Use surveys, 1:1s, and honest feedback to get a pulse on where your firm stands today.

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### 2. Identify Your “Admin Anchors”

What tasks are weighing your team down? Look for:

- Repetitive manual work
- Bottlenecks in document approvals or data entry
- Version chaos
- Endless app-switching

#### Action:

Pick one process to streamline this quarter—like onboarding, document signing, or internal requests—and explore tools (like SuiteFiles 😊) that can automate it.

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### 3. Define Quick Wins and Long-Term Plays

You don't need a 12-month HR strategy to start making change. Some small, immediate wins might include:

- Introducing shoutouts in team meetings
- Adding a “wellbeing check” question to your 1:1s
- Creating a template library to save people time
- Giving your onboarding process a refresh

Then layer in bigger shifts:

- Revamping your growth pathways
  - Updating performance review processes
  - Rewriting policies through a people-first lens
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### 4. Build Your People-First Toolkit

Empowering your team requires the right support systems. Look for tools that:

- Remove admin friction
- Encourage collaboration
- Centralize knowledge
- Make it easy to work anywhere, anytime

**SuiteFiles**, for example, helps firms:

- Automate workflows and document templates
- Manage tasks and client files in one window
- Eliminate scattered systems and file chaos
- Support remote work with secure, cloud-based access

If you want your people to do their best work, give them a workspace that makes that possible.

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## 5. Track What Matters

You can't improve what you don't measure. Identify a few key people-first metrics to monitor, such as:

- Employee Net Promoter Score (eNPS)
- Time spent on admin vs. billable work
- Retention rates and exit feedback
- Engagement in team surveys or initiatives

Regularly check in on progress, celebrate wins, and adapt as your team (and business) evolves.







## Conclusion

### **The Bottom Line? Start With People. The Rest Will Follow**

The firms that will thrive in the next decade aren't the ones with the flashiest perks or biggest budgets. They're the ones that create environments where people feel trusted, supported, and empowered to do meaningful work.

That starts with reducing friction. With streamlining the admin. With making space for better conversations, deeper work, and brighter ideas.

**Start where you are. Start today. And start with your people.**



## SuiteFiles is the secret to supercharging your firm

Our powerful and intelligent workspace is the perfect solution for overcoming your business' biggest challenges thanks to our seamless document and email management, secure client portal, vast integrations, task management, digital signing, and so much more.

Book a demo to see how SuiteFiles can generate maximum end-to-end impact for your firm.

[Book a demo](#)