



# Scaling your practice through business development & marketing

Jim Boomer

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# CPE Process

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- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

# About today's speaker



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Accounting Today Top 100

CPA Practice Advisor's Top 25 Thought Leaders

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# Objectives

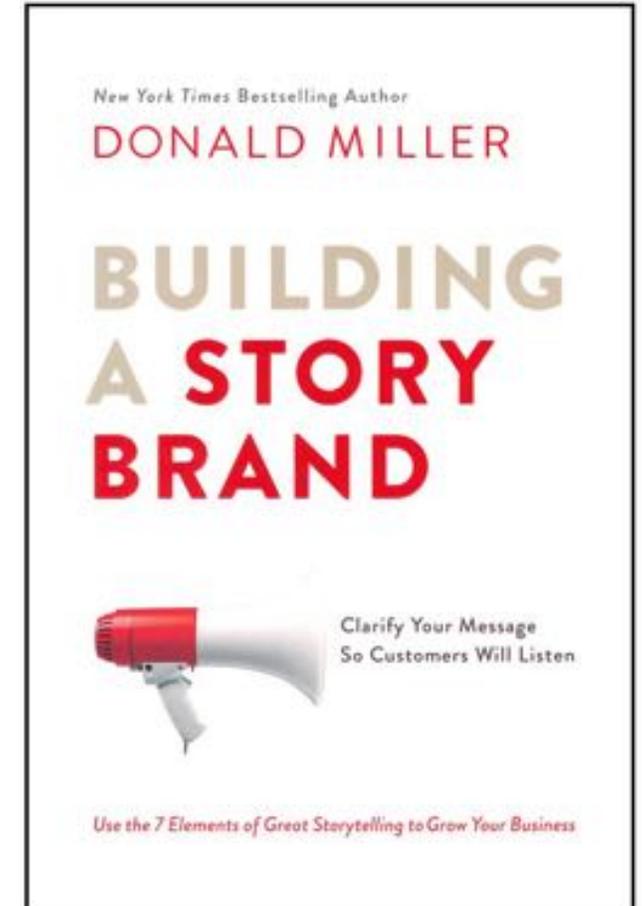
Learn the most essential sales & marketing strategies that will allow your practice to scale.



# Agenda

- ✓ **Marketing**
  - Messaging & positioning
  - 4 Essential marketing strategies
- ✓ **Marketing tools**
  - Webpages that work
  - effective emails
  - client testimonials
- ✓ **Sales**
  - Top 20 & Farm club
  - Managing your pipeline
  - Pain funnel
- ✓ **Sales tools**
  - Better BD conversations
  - Growing strategic accounts

# Messaging & positioning - Brandscript



# A character - Brandscript

Who are they?

What do they want?

## Sample

A small business owner looking to grow revenue and increase profitability.



Your Brand Should Tell a Clear Story.

# With a problem - Brandscript

External

Internal

Philosophical

## Sample

How do I grow revenue & increase profitability?

Will I be able to figure this out?

Shouldn't there be an easier way?



# Meets a guide - Brandscript

Empathy

Authority

## Sample

We understand your struggle and have helped dozens of small businesses grow revenue and increase profitability.



# And gives them a plan - Brandscript

Summarize your plan or process

## Sample

We've create a simple 3-step process to help you begin growing today.

1. Complete interest form
2. Have 30-minute planning call
3. Begin implementing one-page plan



# That calls them to action - Brandscript

Direct

Transitional

## Sample

Complete the interest form today

Download the 10 things you need to know to begin growing your small business.



# That results in...

Success

Failure

## Sample

Be clear and confident you are taking the right steps toward growing your small business.

Avoid the confusion and frustration that will cause your small business to struggle.



# Summary - Brandscript

Your customers are the hero, your brand is not.

Customers want your brand to participate in their transformation, not be their transformation.

The more understood customers are, the more confident they are in your ability to solve their problems.

Having a clear understanding of how to do business with you, and how you will solve their problems, is critical.

Helping your customers visualize their possible success and failure will better result in them taking action.

# 4 Essential marketing strategies

1. Common website mistakes – what to do instead
2. Email marketing – maximizing results
3. Transitional CTAs – lead-generating pdfs
4. Customer testimonials – the right questions to ask



# 7 Common website mistakes

Common mistakes	What to do instead
1. Not clear about what you do	1. Easy-to-understand headline or tagline (5 second rule)
2. You focus on your solutions, not your customers' problems	2. Describe your customers problems with clarity showing empathy and authority
3. You talk about your history, awards and recognitions	3. Relegate this information to a very small portion of your website (e.g. biographies, about us, etc.).
4. No proof your services work	4. Use client videos and/or testimonials and customers' logos
5. Your visuals are meaningless	5. Use visuals that provide clarity and/or show happy customers. Minimize stock photos.
6. Too much information	6. Cut, cut and cut some more. It should be painful.
7. You weren't clear with what action you wanted people to take	7. Clear direct and transitional call- to-actions

# Website case study & review



# Email marketing best practices

Defined goal – What is your goal for sending the email?

Subject line – Clear, concise and intriguing

Call-to-action – Single, clear call-to-action in the top part of the email

From name – Must be recognizable and not generic

Personal – Conversational tone, not overly formal

Mobile friendly – Does the email look good on your phone and tablet?

Easy to skim – Simple, straightforward layout

Test – Proofread and check links

# Email marketing campaign example

1. Thank You for signing up/downloading the...
2. Problem & solution – Talk about a problem people are having (that is relevant to the recipient and propose a solution.
3. Testimonial / client story – Highlight a happy client, share a success story
4. Overcome an objection related to the service you are providing
5. Sales “letter” – a more detailed, lengthy email.

*All emails have a single, clear call-to-action!*

# Lead generating PDF

Provide value to prospects  
(establish empathy & authority)

Grow your marketing list

Qualify prospects



# Lead generating PDF examples

## Value List

7 Common tax mistakes small business owners make

8 Tips for increasing your profitability

## Magazine Article

Take an existing article and liven it up with graphics, charts, images, etc.

## Interview

Interview a colleague, client or thought leader on a specific topic

## Checklist

The automated back office checklist

Growing your small business checklist

# Client testimonials

I loved the workshop, thanks!

Or...

I've been struggling for years to know how to best grow my business. But when I attended the SAN Client Advisory Services Workshop, I received so many helpful tools that gave me clarity and confidence about how to best grow. My business is growing more than ever and I'm having the most fun I've had in a long time. THANK YOU!

# Client testimonials – Questions to ask

1. What was your biggest challenge prior to...
2. How did we help you overcome that challenge?
3. What results can you share?
4. What are you able to focus on now that you no longer have this challenge?

See “Four Essential Questions to Ask Your Clients to Get Better Testimonials”

# Marketing recap

**Brandscript to clarify your messaging**

**4 Essential marketing strategies**

Common website mistakes – What to do instead

Email marketing – Maximizing results

Lead-generating PDFs

Customer testimonials – The right questions to ask



# Sales Strategies

Top 20 Farm Club

Pipeline

Pain Funnel

# Top 20

20 Targets / relationships

Most likely to result in revenue within the next 90 days

Current clients

Past clients

# Top 20 strategy

Call all of them. Yes, all of them.

## Messaging

- “We’re growing our \_\_\_\_\_ practice and would like to interview you in order to develop our strategy. Would you be willing to have a 20 minute call with me so I can pick your brain?”

## Questions

1. What 2-3 key issues are most important to you related to \_\_\_\_\_?
2. How familiar are you with these types of services?
3. What other organizations do you know that offer these types of services?
4. How could this type of service be positioned to best resonate to organizations like yours?
5. We are looking for an early adopter for our new \_\_\_\_\_ service. Does anyone come to mind?
6. What can I do to help you?

# Farm club

20 Longer-term targets / relationships

Most likely to result in revenue after 90+ days

Industry thought leaders

Association members / leaders

Other channel contacts

# Farm club strategy

Call all of them. Yes, all of them.

## Messaging

- “We are looking to expand how we help \_\_\_\_\_ organizations. As a thought leader in the profession, I know you have valuable insights to help us increase our market intelligence and identify market holes so we can help \_\_\_\_\_ organizations create better strategies and develop our own thought leadership. Would you be willing to have a 20 minute call with me so I can pick your brain?”

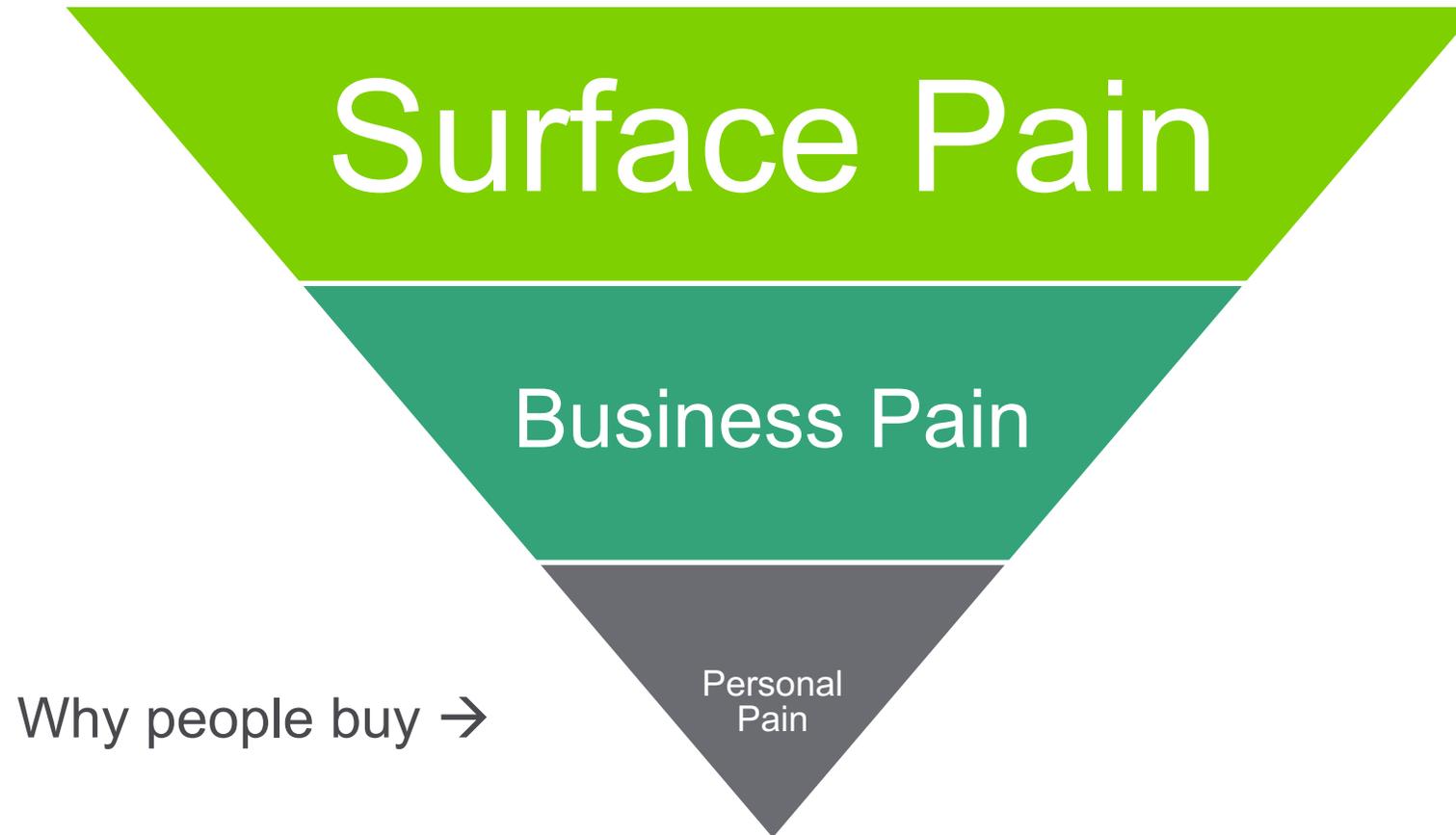
## Questions

1. How would you characterize the business climate for \_\_\_\_\_?
2. What 2-3 issues are most important right now?
3. What organizations do you know of that are helping \_\_\_\_\_ address those issues?
4. If we were looking to expand into those areas, what advice would you have?
5. Who else should I talk to?
6. What can I do to help you?

# Managing your pipeline

	<b>Discovery</b>	<b>Deep dive</b>	<b>Decision making</b>	<b>Awaiting signature</b>	<b>Close</b>
<b>Purpose</b>	Initial Questions Understand Pain/Why Understand the Decision Making Process Match to Capabilities	Connect w/ Decision Makers Detailed Questions Understand nuance/specifics Share Capabilities & Process Share Pricing	Client Has a Clear Option to Choose Going Through the Correct Decision Making Process You're Involved When Appropriate The Next Discussion Is Already Scheduled	Client Has Agreement Waiting for Signature	Work Won Details Communicated to Appropriate Parties

# Better business development conversations utilizing the pain funnel



# Growing strategic accounts – The team approach

**#1 – Select the Client You Would Like to Grow Strategically**

What client would like to grow?

**#2 – Determine the Three Key Players in Your Firm. Identify the Account “Quarterback”.**

Who are the three key players in your firm to grow this account strategically?

**#3 – Determine the Three Key Players on the Client Side**

Who are the three key players in the clients business?

**#4 – Determine at least Three Key Services This Client Could Benefit From**

What are the three services that they would benefit from the most?

**#5 – What Are the Five Next Steps You Can Take to Begin Growing This Account?**

1	2	3	4	5

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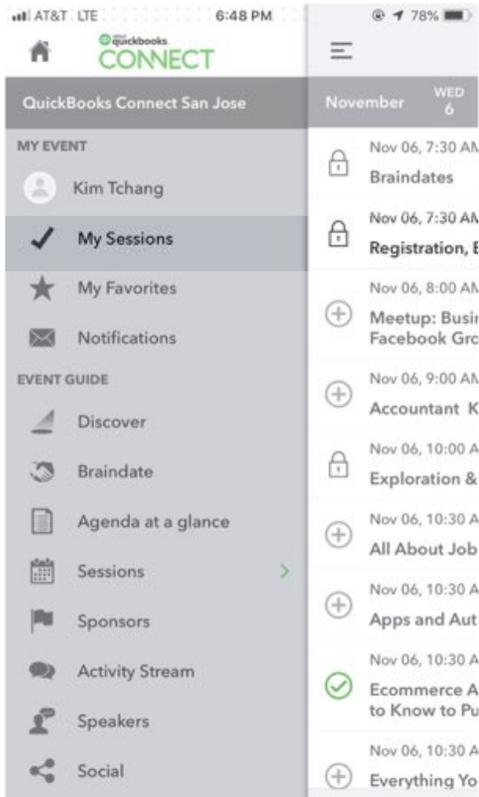


# Questions?

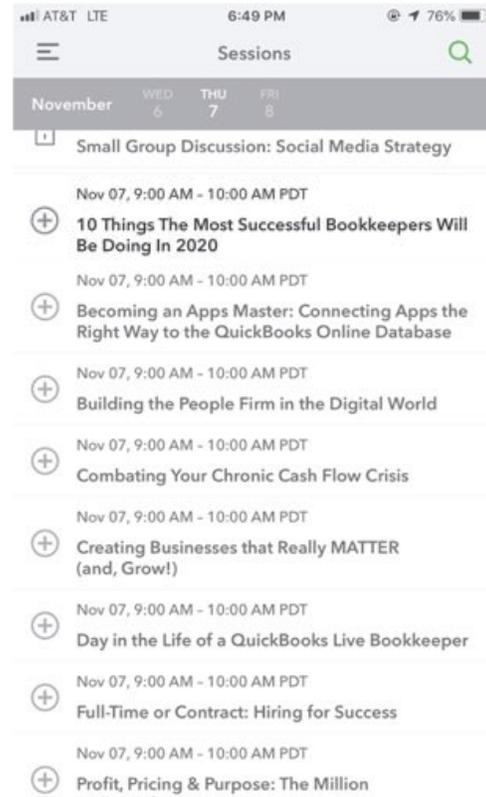
# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

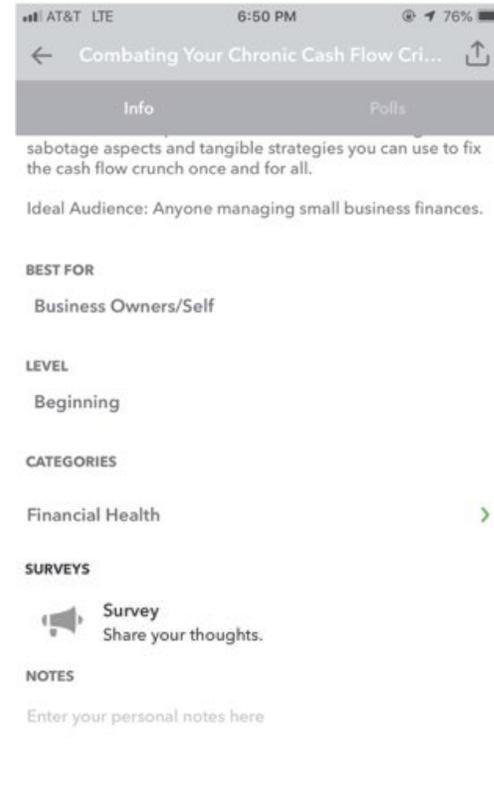
## 1. Select Sessions



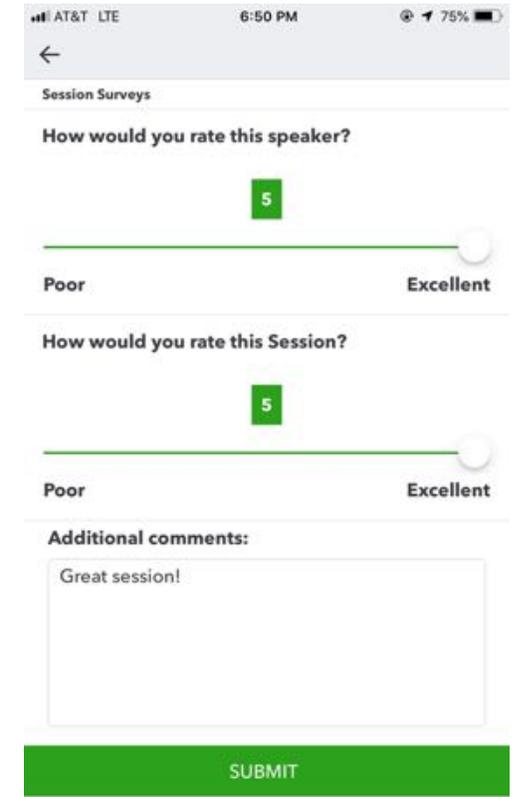
## 2. Select Session Title



## 3. Select Survey



## 4. Add Ratings



# Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks CONNECT agenda page for November 7. The page features a navigation bar with links for 'Why Attend', 'Agenda', 'Speakers', 'Pricing', 'Sponsors', 'Travel', and 'FAQ'. A 'Register now' button is located in the top right corner. Below the navigation bar, there are tabs for 'November 6: Accountant Day', 'November 7' (which is selected), and 'November 8'. A 'Print Agenda' button is also present. The main content area includes a search bar labeled 'Search for sessions' and a set of filters: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health'. An 'Expand all +' button is located to the right of the filters. The agenda items are listed in a table with columns for time and session details. The items include: '7:30-9:00 am Registration, Breakfast & Exploration'; '7:30-10:30 am Braindates' (with a description and 'Best for: All Audiences', 'CPE Hours: not eligible'); '8:00-8:30 am Yoga'; and '8:00-8:45 am Breakout Sessions' which includes four sub-items: 'Small Business Meetup: Relationship Marketing and the Power of Human Connection', 'Small Group Discussion: Social Media Strategy', 'Small Group Discussion: Showing up - Why What You Wear Matters', and 'Small Group Discussion: Build Your Dream Bookkeeping firm'. Each item has a '+' icon to its right.

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