

Howell Associates



The Keys to a Successful Marketing Plan and Making a Winning Presentation!

**“If hard work is the key to success, most people would rather
pick the lock.” ... Claude McDonald**

The Target Market!

FOCUS on Small Businesses



The Prospecting System



ClickStamp Online.Ink



Generating the Appointments and Leads

Accountant Follows-up and finalizes the agreement for the services to be provided and fees



Going on the Appointments:

Accountant meets face-to-face with prospects to discuss the client's needs and the accounting, tax, and payroll services offered. Accountant then quotes an estimated fee and leaves a business card and the brochure.

Mail the thank you letter:

Follow-up calls to the prospects

Marketing additional products & services

Another satisfied client!





Most effective presenters

- ◆ Professional [non-salesman]
- ◆ Relaxed
- ◆ Upbeat and positive attitude
- ◆ Great listener
- ◆ You never "close" a sale; you "open" a long-term relationship with the client based on integrity and mutual trust. This feeling will be felt by the prospect through your display of empathy and caring.
- ◆ Stimulate their imagination on what may be possible through using your firm's services.



What does the prospective client really want or need?

- ◆ **Keep them out of trouble**
- ◆ **Compliance**
 - **Fear of IRS audits**
 - **Tax returns**
- ◆ **Business and tax consultations**
- ◆ **Personalized Services**



5 steps to a great presentation

- ◆ **Bonding - break down the barriers**
- ◆ **Take control of the presentation**
- ◆ **Find “hot buttons”**
- ◆ **Give a winning presentation**
- ◆ **Summarize presentation**



Bonding with prospect

- ◆ Discuss something more important than business in the beginning
- ◆ Not looking for an immediate commitment today

Take control of the Appointment

Get permission to ask questions

“Do you mind if I ask you a few questions about your business?”



Finding “the hot buttons”

Ask questions slowly

“What are you doing now in the area of your record keeping, payroll and income taxes?”

Most of my clients tell me there are 3 major reasons for selecting or changing accountants

- 1. Affordable Costs**
- 2. Useful Reports**
- 3. Service**



Give a winning presentation

- ◆ **Emphasize your strengths & competence**
- ◆ **Explain the benefits of being trained by Howell Associates – Your competitive advantage**
 - **Affordable costs, low overhead, support**
 - **Better management reports – specialized accounting software**
 - **Better services through sharing of knowledge**
- ◆ **Address concerns expressed during “hot button” questions**
- ◆ **Give an estimated fee quote**



Summarize presentation

- ◆ Thank them for their time
- ◆ Let them know you don't expect a commitment now – “I understand that the selection of your accountant is probably one of the most important decisions you will ever make concerning the success and growth of your business.”
- ◆ Leave brochure and business card
- ◆ Follow-up and Follow Through

One business...many clients!

Can you Handle The Growth?

Potential new clients
from one small business client

