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Introduction - break down of what you will learn:

- Using a system to market your accounting firm.
- How to realize \$200-\$300 per hour.
- How to realize profits that are double the industry average.
- It's all about profits, not gross fees.
- Lifestyle and happiness are key - We/accountants can enjoy a balanced lifestyle.
- What do your prospects/clients want most from you - and how to communicate this critical concept to secure and retain clients.
- Focusing on a "non-traditional approach" for greater success.
- The true value of a business client
- Understanding which business client will make you the most money with minimal effort/stress.

Direct Mail:

- Does direct mail work in business-to-business marketing?
- What is target marketing?
- How to target your message to businesses?
- Examples of using direct mail to target your message.
- What is most important in direct mail?
- How to secure prospect lists?
- What demographic factors are important when ordering lists?
- How to dramatically improve the "quality" of the lists you rent?
- How to use direct mail for targeting individual tax prospects?
- Our direct mail list recommendations
- Developing effective offers in direct mail.
- Tips to improve your offer, and response...
- How to approach writing a direct mail letter.
- The sequence of steps for writing a direct mail letter, thereby increasing response rates.
- Sample direct mail campaigns – We provide you with creative/copy so you can implement.
- Should I use a direct mail letter or postcard?
- The costs of direct mail.
- How to avoid the biggest mistakes.
- The system for using direct mail. How much? When?

Appointment Setting – Warm Calls, Not Cold Calls: (disc provided)

- Synchronizing direct mail with appointment setting for greater results/conversion.
- Warm calls versus cold calls.
- Understanding which prospects are worth pursuing and why.

- 3 key elements to determine whether a prospect is right for you.
- Code of conduct in today's world for appointment setting.
- Tracking prospects correctly using the right system.
- What to say on the phone to the owner.
- What to say on the phone to receptionist.
- What to say when voicemail picks up.
- Overcoming objections politely yet motivationally to secure client.
- How to hire an appointment setter and what to expect.
- Most common hurdles to overcome while appointment setting.
- Examples of how to handle appointment setting objections.
- The KISS system for appointment setting – Keep It Simple
- How to handle callbacks and ticklers
- Barriers to entry – you don't have to do this yourself.
- The system for appointment setting.

Closing & Pricing Strategies:

- Process for improving your appointment consultation.
- Process for determining if appointment is worth conducting.
- How to explain the value of your services to a small business owner. Even the QuickBooks user!
- The technique for closing clients. It's easier than you think!!
- How to identify a prospects profit before meeting them- and why you need this now.
- How to make your closing technique specific to your prospects needs.
- Strategy for closing prospects.
- Using the 3 pronged approach - DSQ
- Managing prospects – fence sitters, foot draggers and commitment phobias.
- Closing business, after the closing has taken place.
- Should you bill hourly or fixed retainer?
- Making in excess of \$200-\$300 per hour, without your client ever knowing.
- How to price QuickBooks users – and make real money!
- How to use the pricing matrix for simple/understandable pricing.
- Improving collections and cash flow.
- How to address fee objections from current business clients.
- The accounting/tax agreement to use for small business clients.
- Sequence of steps for closing small business clients.
- Demonstration of how to explain your fees - so the small business owner gets it!!
- What to present to small business clients.
- Key practice management tips designed for your practice to run efficiently, and more profitably.
- Step-by-step chronological guide for closing business - so nothing is missed.

Internet Marketing Part I:

- How the internet can help you develop a “superior” practice
- Using the internet to develop a niche in your practice
- Why developing a niche is so important.
- Why internet leads are better than telemarketing leads.
- What your website “must have” and accomplish.
- How your website will act as a “silent salesperson” for your accounting practice.
- How to acquire a consistent flow of new clients from the internet.

- How to pull prospects to your website.
- What is search engine optimization (SEO)?
- Key steps to getting your website towards the top of the search engines.
- Why “canned” websites are lost on the internet (online brochures) that generate zero leads.
- Best practices for search engine optimization.
- Demonstration of search engine optimized websites.
- Benefits of pay per click advertising. And challenges.
- What to do about online yellow page advertising.
- How to secure free exposure on the internet.
- How to capitalize on Craigslist.

Social Media:

- What is Social Media
- Social Media Revolution
- Background and Key Concepts
- Trust Marketing
- How Social Media Connections Work
- The Big 3 - FaceBook, Twitter, LinkedIn
- Keys for Social Media Success
- How to Capitalize on it
- Enhancing Your Website Using Social Media
- Teach, Don't Sell
- Other Accountants Who Use Social Media
- How to Post Content; step by step implementation
- Additional Resources

Internet Marketing Part II:

- How to close business from the internet.
- What types of prospects should you expect from the internet.
- Why business clients secured via internet marketing are very profitable for you.
- What to say when an internet prospect contacts you.
- How to prepare for inbound internet inquiries so you can be effective when closing.
- How often should you meet with ongoing internet clients.
- Using FTP and portals.
- Why you need to quickly size up 1040 prospects who contact you.
- How to convert the right type of 1040 prospect into a long-term, high yielding client.
- Key pre-drafted templates to use when communicating and closing internet business.
- How to save time using the internet.
- The accounting/tax agreement for internet prospects.
- How to handle business clients below a certain profit threshold.
- The internet marketing system for acquiring new clients.

Additional Strategies:

- Why you must know how to incorporate and form a business for your prospect – an absolute must.
- Overcoming legal ramifications.

- How to pitch this to your prospects.
- Strategic partners to help leverage your time in this area.
- How much to charge – when to get paid (depends on type of prospect/client)
- Step-by-step guide for how to form a business for your client.
- How to make your existing clients want to refer to you.
- Using easy techniques to gain referrals
- Sample letters and templates.
- References.