

# 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



**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?

