



STRIKE TO SELL: Your Ultimate Tax Season Conversation Battlecard



At the peak of the tax season – accountants come to realise a thing or two about the “truth” of warfare. With loads of tax returns bombarding your work stations while your co-workers keep dropping out like flies – the casualties are heavy.

The **Tax Season Conversation Battlecard** is to help you make up for these tax season casualties by winning more clients and getting more business from existing ones – by keeping a check on their changing needs.

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- ➔ Part I: Reconnaissance
 - ➔ Part II: A War Plan
 - ➔ Part III: The Strike
 - ➔ Part IV: The Agreement

PART I : RECONNAISSANCE

Knowing the basics are winning half the battle. Do your homework by researching on your prospects before going into a meeting with them.

Background Check:



New Clients

- Go through your client's website – their services, offices, latest developments etc.
- Get well-versed with the client's leadership/ management team by going through their LinkedIn Profiles.
- Research enough to know what kind of services they have already expanded on and what they are wanting to expand at this point.



Existing Clients

- Figure out what services they intend to expand or what they have recently expanded.
- Get introduced to their management representatives or important people who head the particular service line.

Be a friend

Work out ways to show how can help them out with their existing business issues.

What are other ways you can help?

Update them about your firm's services that they haven't taken advantage of before.

PART II: A WAR PLAN

Since most of the times, your client may not know what they want or how they should go about a problem – it is important that you discover their pain points and reveal ways to help them achieve their goals quicker.

Here's a war plan to combat all the problems for you clients by understanding their ambitions for their business in the following ways:

Upscaling

- Has the business expanded or scaled back operations or is it planning such changes?
- What are your overall growth goals for the company?
- Do you have a key strategy to achieve these goals?
- Do you have a good understanding of how your business performed last year?
- How are you tracking performance – monthly, quarterly?
- Is your business generating sufficient cash flow?
- Have you employed more staff or invested in other growth initiatives this year as you've intended to? If not, what has prevented you from doing so?

Revenue and Profits

- When it comes to facing challenges in increasing sales – be prepared for the following problem statements from your clients
- "My costs are too High"
 - "I don't have enough time to upsell and cross-sell to my clients"
 - "The output of my employees isn't always accurate, timely or comprehensive"
 - "I fell short on the profits I projected for this year"
 - "I don't exactly know what to do differently to improve profitably this tax season"
- Be ready with answers on how you will attack each of these profit-related conundrums pestering your client's business.

Future Ventures

- What are your business, family personal goals over the next 12 months?
- Where are you now versus these goals?
- Is there a strategy to achieve that vision?
- What are some challenges that may come in the way of achieving these future ventures?

PART III: THE STRIKE

You know them well now. Now you should explain how you can make things better for them:

1

Tell them how you can help and find out what they've decided.

- A. **Be Upfront:** Now that your client has been "primed/clued up" thanks to all the collaterals circulated in advance, ask the for the verdict to the decision-maker/stakeholder in person upfront.
- B. **Speak Less, Listen More** – Rather than you trying to sell a 100 different advantages off your Menu in detail and making the meeting lengthy and cumbersome, just highlight all of the advantages and let the stakeholder speak about what they wish to achieve in the near future, their current pain points and their plans for the future.
- C. **Troubleshoot** only these aforesaid points now as you know these are the issues that are central to the client at this point of time.
- D. **Talk about other clients** (without divulging names and/or confidential details) and how they have ramped up the service line using these outsourced services
- E. **Don't Promise** them the Moon but also **do not oversell** the Low-Hanging Fruit

2

Discuss next steps for how can you help further

- A. **Organise consulting sessions** with clients
- B. **Ensure** that the short terms solutions you're putting in place for your clients are in line with the client's long term vision.

PART IV: THE AGREEMENT

An SLA or a Service Level Agreement is the best way to manage expectations on both ends. To sum it up in 3 steps – an SLA's helps in agreeing upon:

1

What services will be delivered?

2

When those services will be delivered?

3

In what manner will those be delivered?delivered?

How to go about it:



Get Prepped: If the new client / new service with an existing client comes on-board, draft Detailed SLA's to define the Service Delivery.



Keep the Promises: Ensure they are agreeable to both parties but put in an extra effort to ensure that your Client's current pain points are solved. After all, that was the decisive fac-tor in making the sell – even if it means a temporary investment of time, money, resources and expertise and you need to go "above and beyond." Do it but ensure you resolve the cli-ents' pain points.

Remember, nobody forgets people (or in this case vendors) who swim with them against the tide.



For Accountancy Firms

Find out more about how QXAS can help you and your business de-tax this tax season

GET IN TOUCH >

Email us at qxas@qxglobalgroup.com or call us on 0845-838-2452