

STRIKE TO SELL

YOUR ULTIMATE TAX SEASON CONVERSATION GUIDE



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For Accountancy Firms

As the tax season sets in, accountants come to realise a thing or two about the art of conversing. With tremendous scope to win more clients and get more business from existing ones, striking conversations is one skill accountants must nail.

This Tax Season Conversation Guide is crafted to help you master the art of conversation and build relationships during the tax season.

In this guide, you will learn:

Preparation

Setting The Stage

The Strike

The Agreement

PREPARATION

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



New Clients

- › Go through your prospective client's website – their services, offices, latest developments, etc.
- › Get well-versed with their leadership/management team
- › Check out their LinkedIn profile for clients and important announcements
- › Research what kind of services they have already expanded on and what they are looking to expand



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

SETTING THE STAGE

Since most of the time, 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 detailed plan to combat all problems for your clients by understanding their ambitions for their business.

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?
- › How are you tracking performance – monthly / quarterly?
- › Is the business generating sufficient cash flow?
- › Has the business employed more staff or invested in other growth initiatives this year?

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."

Future Ventures

- › What are the business's growth goals over the next 12 months?
- › Where are they 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?
- › Is the business prepared to implement the impending changes?

THE STRIKE

By now, you know them well. Now it is time to explain how you can make things better for them.

1 Find out what they have decided

Be Upfront: Now that your client has been primed with the collaterals circulated in advance, ask for the verdict from the decision-maker/stakeholder upfront.

Speak Less, Listen More: Rather than trying to sell 100 different advantages off your menu and making the meeting lengthy, let the stakeholder speak about their current pain points and plans for the future.

2 Tell them how you can help

Troubleshoot Only the points central to the client and educate them on how you can help.

Talk about other clients (without divulging their names and/or confidential details) and how they have ramped up their service line using outsourced services.

Don't promise them the Moon, but **do not oversell** the low-hanging fruit.

What are other ways you can help?

- > Organise consulting sessions with clients.
- > Update them about your firm's services they haven't taken advantage of before.
- > Ensure the short-term solutions you're putting in place align with your clients' long-term vision.



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 helps in agreeing upon:



HOW TO GO ABOUT IT?



Get Prepared:

If a new client / new service with an existing client comes on board, draft a detailed SLA to define the service delivery.



Keep the Promises:

Ensure you put in extra effort to resolve your client's pain points and keep all the promises. Follow the SLA at each step and go above and beyond to ensure complete client satisfaction.

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

Tax? Relax!

Find out how QXAS can take the stress out of the tax season

GET IN TOUCH >

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