

Practice Development Seminar

- ❖ Top 10 Accountant's Excuses For Not Implementing A Practice development Plan
- ❖ The Key Elements of Long-Term New Business Success
- ❖ Why Are Most CPA's Not Successful At Practice Development
- ❖ Implementing the Game Plan
- ❖ Build Your Personal Marketing Plan- the Clients Will Come
- ❖ What is a Rainmaker & How Rainmakers Make it Rain
- ❖ Target Marketing VS. Shotgun Approach to Practice Development
- ❖ New Business Marketing Funnel
- ❖ Make it Drizzle Before You Make it Rain—Start Now
- ❖ Annual Time Budgeting
- ❖ Personal Branding & Public Relations Benefits
 - ❖ Branding & Public Relations Techniques

Client Prospect

- ❖ Client Prospecting Process

Lead

- ❖ Professional Services New Business Process

Qualify Leads

- ❖ New Business Process

Plan the Approach with Client Leads

Goal: Turn Client Lead into a Client Prospect

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First Meeting

Goal: Make great first impression, further qualify, identify needs and ability to service. Turn Client Lead into a Client Prospect.

- ❖ Questions for a New Prospect Meeting
- ❖ Characteristics of Later Questions
- ❖ Professional Services Sales Process
—It's all in the Follow-up

Follow-up Activities

Goal: Develop further interest to turn the Client Lead into a Client Prospect and make a formal proposal.

- ❖ The Pathway to Building a New Client
- ❖ Target Marketing and Pre-Qualification
- ❖ Case Studies—Tell the Story
 - Types of Case Studies:

Proposal Stage

Goal: Turn Client Prospect into a Potential Client by issuing a proposal.

Proposal Follow-up Activities

Goal: Have Potential Client sign the proposal.

- ❖ Sample Short Form Proposal
- ❖ Sample Change Order

Challenges facing E-Commerce businesses, like yours

- ❖ Sample Short Form Proposal

PERSONAL MARKETING PLAN for 2013

- A. Categorizing Clients
- B. Client Requiring Special Attention / Focus
- C. Expanding Services

New Business Development

- A. New Business Development Goal for 2013: \$_____
- B. Target Industry/Service Niche ~ Special Area of Focus
- C. Ideal Client Characteristics

D. Targeted Clients—Your “Wish List”

IV. Referral Sources

A. Network Development

B. Professional & Community Service Activities;

V. Public Relations Activities

A. Identifying Opportunities to Publish Articles

B. Identifying Public Speaking Opportunities

VI. Client/Contact Mailing List

VII. Continuing Education/Professional & Personal Development

VIII. Comments