



2020 Advisory Conference

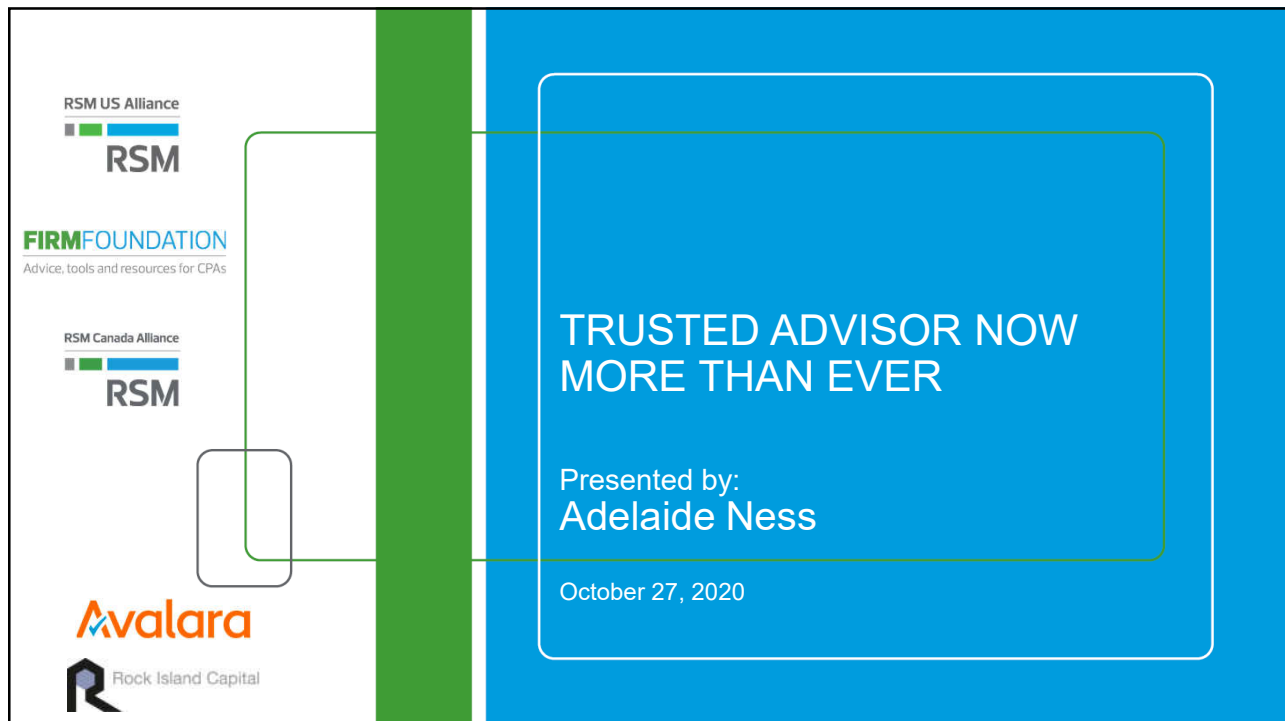
October 27–29

Converging knowledge and behaviors
to deepen client relationships

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Advice, tools and resources for CPAs

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Avalara

Rock Island Capital

TRUSTED ADVISOR NOW MORE THAN EVER

Presented by:
Adelaide Ness

October 27, 2020

Speaker



Adelaide Ness
Owner and CLO
The Rainmaker Companies

Adelaide is a speaker, trainer, coach and consultant to accounting firms around the world. Adelaide's strengths are in marketing, branding, communications, leadership and business development. For over twelve years she has been working with accounting firms to help them build stronger cultures and stronger brands by encouraging excellence and consistency at all levels in a firm.

Email: Adelaide@TheRainmakerCompanies.com

Call: +1 617 849 2977

LinkedIn: www.linkedin.com/in/adelaidentess



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Agenda

Topic	Minutes
Introduction and trust equation	10
Credibility	10
Reliability	10
Intimacy	10
Self-interest	10
Wrap up and action plan	10



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Objectives

By the end of this course, you will be able to:

- Understand the importance of TRUST in building client relationships
- Develop strategies to increase trust with key clients
- Understand the need for reducing self-interest and putting the client first
- Attain perspective on climbing the value ladder toward becoming a more Essential Business Advisor with key clients



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Is prospecting and business development
okay during COVID-19?



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YES.






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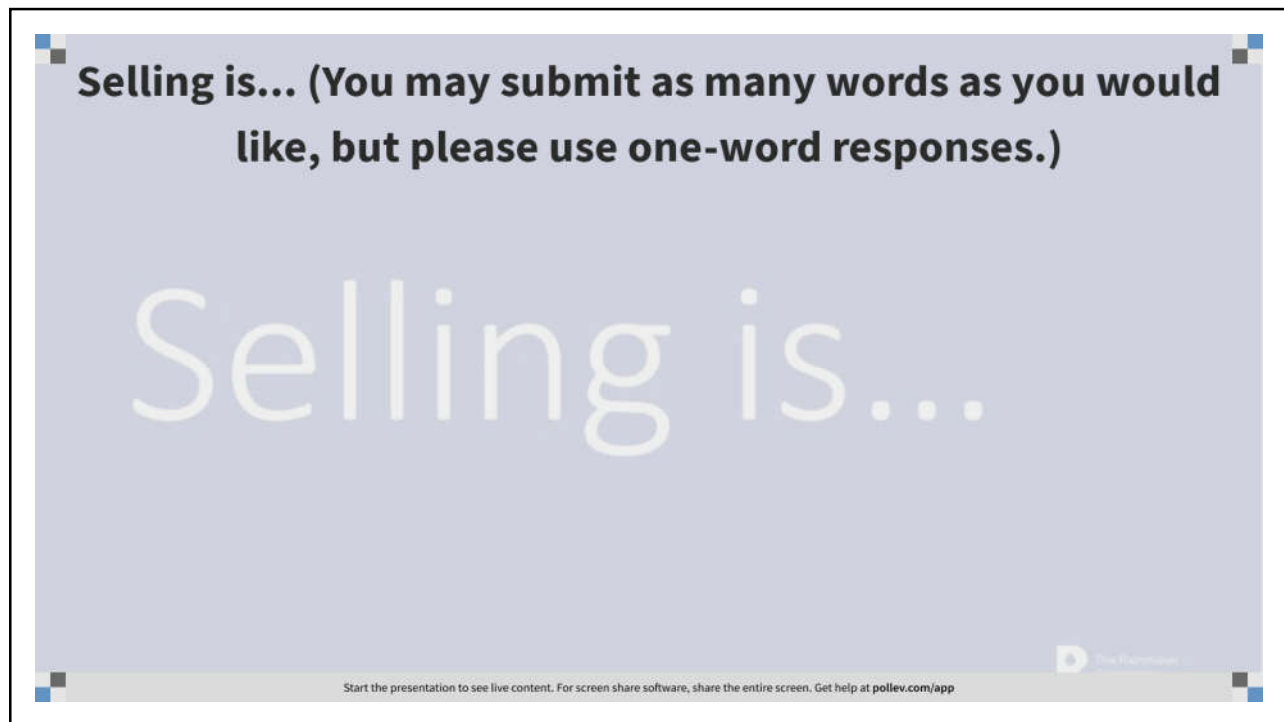

Advice, tools and resources for CPAs







SELLING IS...



The ethics of selling – even before COVID-19






1. It is not okay to sell someone something they do not need.
2. It is not okay to not sell something to someone they do need.

Avalara
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RSM

The slide has a white background with a blue and green vertical bar on the right side. It contains a title, two numbered points, and logos for Avalara, Rock Island Capital, and RSM at the bottom.



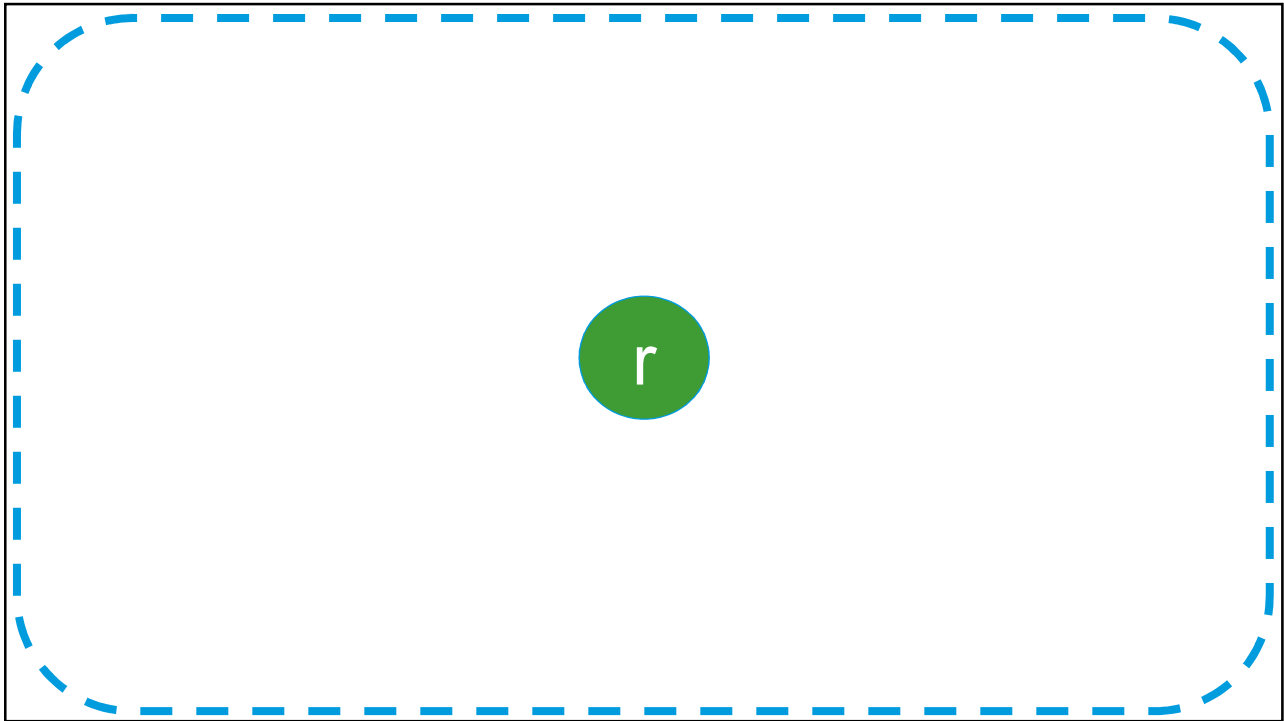
SELLING IS... HELPING!

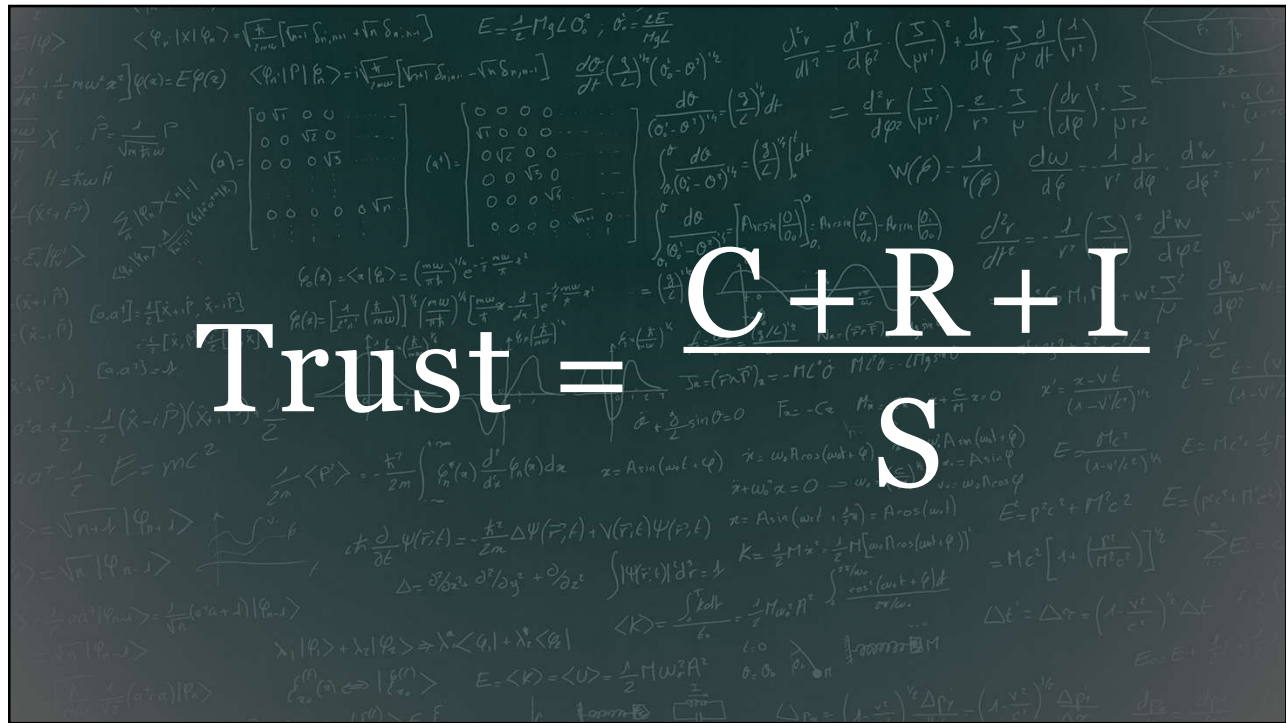
Three strategies for double digit growth

1. Identify “A” clients and super please them
2. Identify “B” clients and turn them into “A” clients
3. Find prospects in your marketplace like your “A” and “B” clients

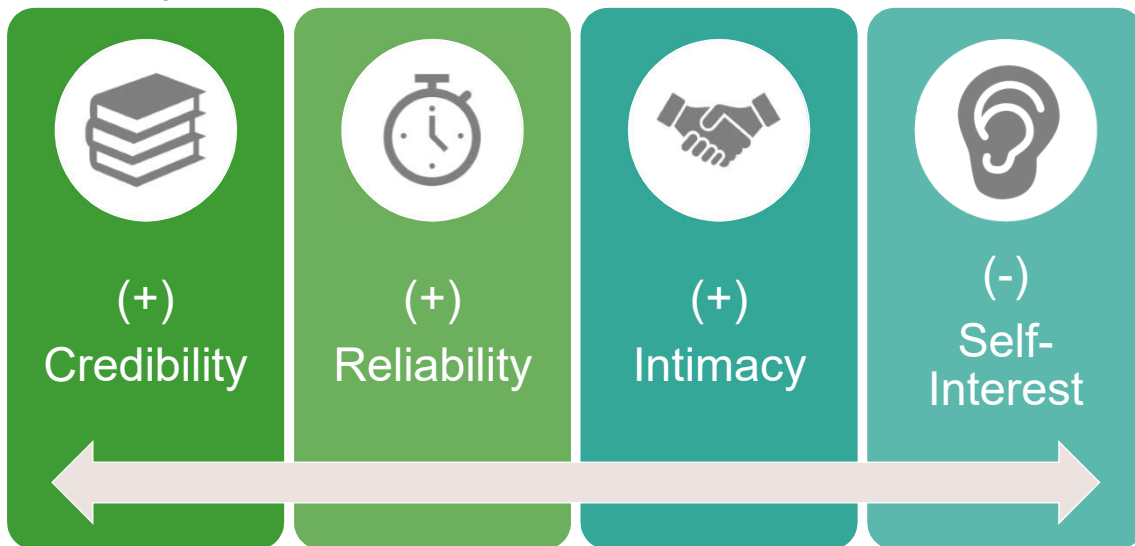


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The components of trustworthiness



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How many have you actually read?



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Demonstrating Credibility

- “I can trust what she says about...”
- Content expertise plus “presence,” which refers to how we look, act, react and talk about our content
- Poor marks on credibility = characterized as “windbags”
 - Be the gold in a sea of beige!
 - Why should I open your message?
 - Why should I take your call?
 - A new spin on the 4 Ps of marketing

Examples of how:

- Relevant certifications and expertise
- Client success stories
- Ensure accuracy
- Knowledge of firm’s services
- Knowledge of client or prospect’s industry
- Tools like SubjectLine.com, Litmus.com, etc.



- Personal
- Peer
- Pointed
- Phone



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Demonstrating Credibility – Use the chat box!

- What else can we do?
- Submit a suggestion in the chat box for remaining credible when we cannot see our clients, prospects and referral sources face-to-face.



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Demonstrating Reliability

- “I can trust her to...”
- Whether clients think you are dependable and can be trusted to behave consistently
- Judgments are strongly affected by the number of times one has interacted with you
- Poor marks = irresponsible

Examples of how:

- Respond in a timely manner
- Ensure ethical compliance
- Proactively bring fresh ideas – does not mean you have to have a crystal ball
- Gain agreement up front about meetings
- Make introductions



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Demonstrating Reliability – Use the chat box!

- Submit a suggestion in the chat box for how to demonstrate reliability while social distancing and working remotely.
- Remember it's not about being available 24 hours per day, but about being dependable!



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Demonstrating Intimacy

- “I feel comfortable discussing this...”
- The most common failure in building trust
- About emotional closeness, not life outside work
- There are obvious human emotions around changes in business and careers
- Poor marks = characterized as technicians

Examples of how:

- Learn your prospects'/clients'/referral sources' communication style
- Set alternate times to connect
- LinkedIn research and Google alerts
- Virtual happy hour
- Greeting cards
- Uber Eats, Starbucks, etc.
- Pattern interrupt – do things differently
- Small things done well



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Demonstrating Intimacy – Managing the virtual meeting

- Preparation
- Audience
- Content
- Engagement
- Socialization



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Demonstrating Intimacy – Use the chat box!

- Submit a suggestion in the chat box for how to demonstrate intimacy while social distancing and working remotely.
- Remember the concept of pattern interruption!



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Reducing Self-Interest

- “I can trust that he cares about...”
- “There is no greater source of distrust than advisors who appear to be more interested in themselves than in trying to be of service to the client.” – David Maister
- It is not about you—make the conversation about them
- This is a time to listen, not solve

Examples of how:

- Zip it—limit interruptions
- Use technology to fully engage
- Talk with client/prospects/referral sources as friends
- Help as if personally responsible for their success



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Reducing Self-Interest - Use the Chat Box!

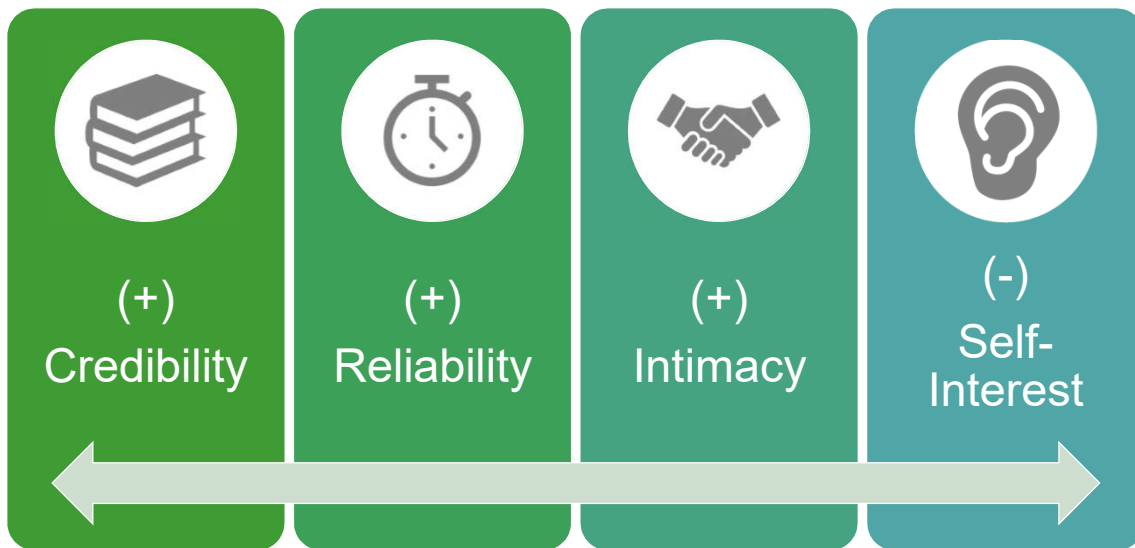
- Submit a suggestion in the chat box for how to demonstrate effective listening while working remotely and connecting virtually.



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The Components of Trustworthiness



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Three Strategies For Double Digit Growth

1. Identify "A" clients and super please them
2. Identify "B" clients and turn them into "A" clients
3. Find prospects in your marketplace like your "A" and "B" clients



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Take the pressure off yourself
and sales will happen.

**Focus on selling
the follow-up.**



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How do you want to be viewed?

As a necessary transaction?



Or as a trusted advisor?



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- The Stockdale Paradox
popularized by Jim Collins
in the book Good to Great.

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“

“You must never confuse faith that you will prevail in the end — which you can never afford to lose — with the discipline to confront the most brutal facts of your current reality, whatever they might be.”

Questions? Let's connect!



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Email: Adelaide@TheRainmakerCompanies.com

Call: +1 617 849 2977

Linkedin: www.linkedin.com/in/adelaidentess



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