



2020 Advisory Conference

October 27–29

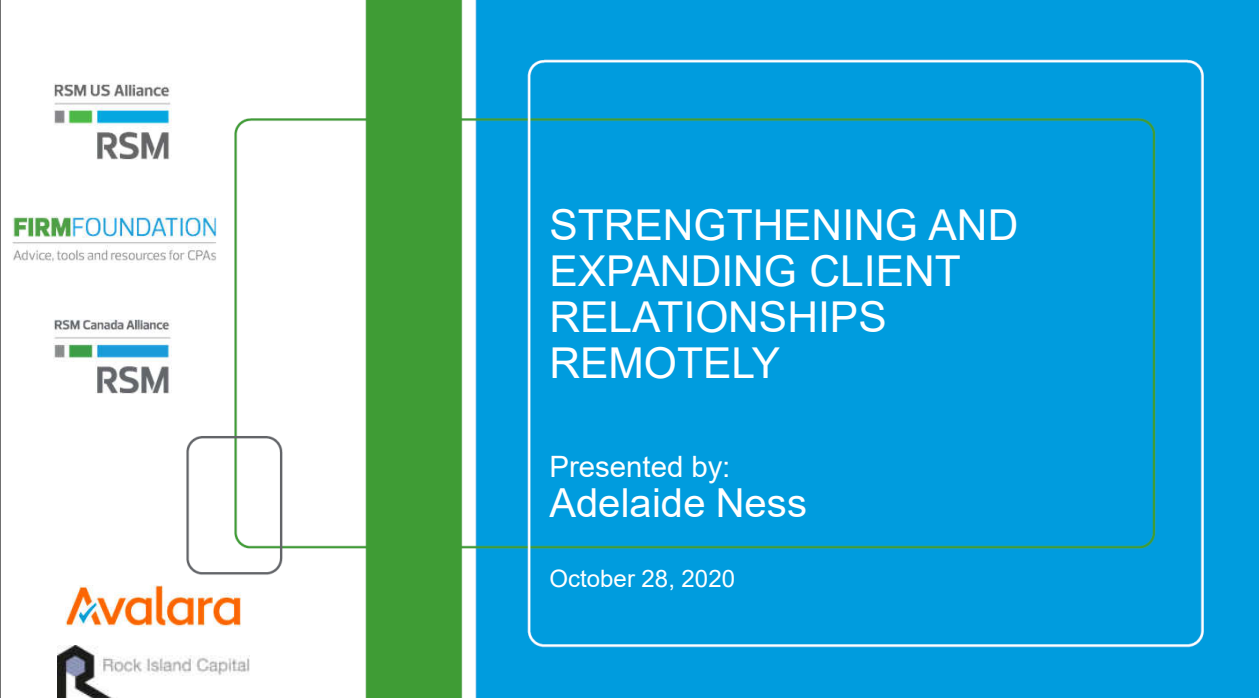
Converging knowledge and behaviors to deepen client relationships

CONVERGE

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STRENGTHENING AND EXPANDING CLIENT RELATIONSHIPS REMOTELY

Presented by:
Adelaide Ness

October 28, 2020

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Avalara

Rock Island Capital

Speaker



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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 12 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.

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Agenda

Topic	Minutes
Introduction and Recap Trust Equation	10
Strategy 1 – Touchpoints and Client-Centered Meetings, Stimulating Referrals	25
Strategy 2 – Understanding Our Client's Businesses	15
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 cross-selling to our best clients
- Discover high-value touchpoints to grow bigger relationships with existing clients
- Learn the Client-Centered Meeting Process
- Understand ways to stimulate qualified referrals from existing relationships
- Develop solutions to climb the Value ladder with existing clients

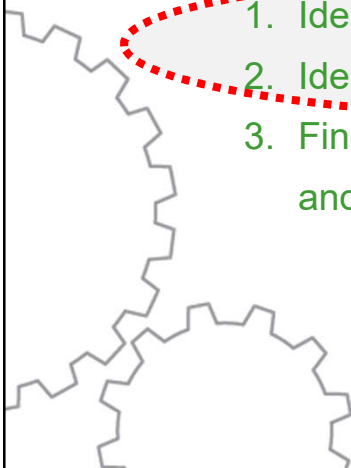


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Three Strategies For Double Digit Growth

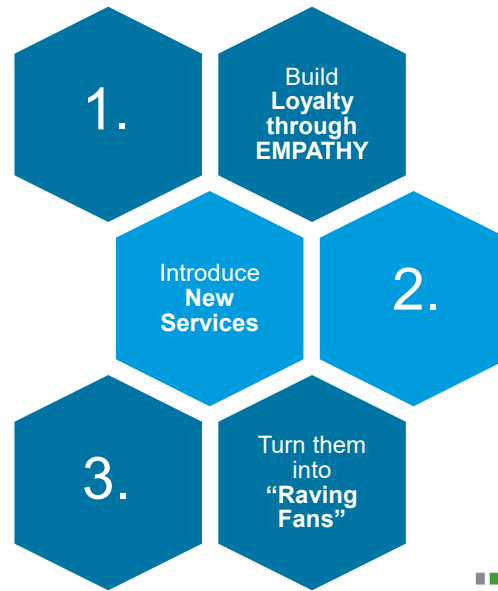
1. Identify "A" clients and super please them
2. Identify "B" clients and turn them into "A" clients
3. Find prospects in your marketplace like your "A" and "B" clients



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Strategy 1 -
Identify "A" Clients
and Super Please
them.



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EMPATHY

Why we fail to connect:



Too busy



Schedule too tight



Fail to accurately take the order and become embarrassed



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What do clients really buy?



Solutions to problems



Good feelings




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Clients buy emotionally

and justify with logic.



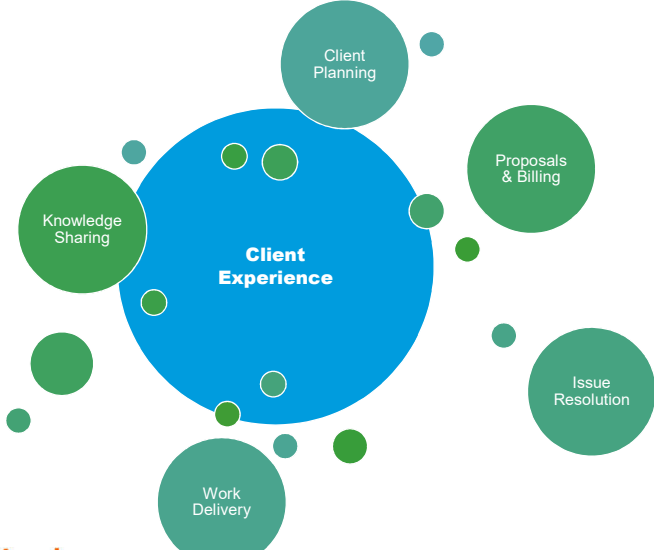





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Client Touchpoints




- What touchpoints do you have with clients throughout the course of your relationships that culminate to define their experience with the firm?

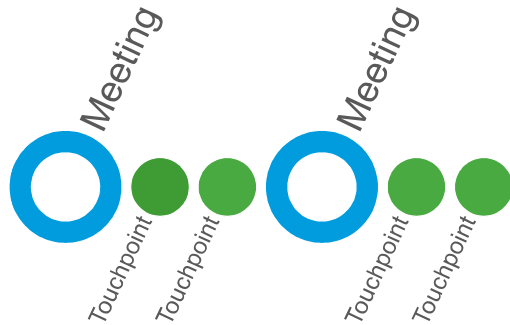




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Plan Touchpoints Between Meetings



Relationship Access

- Make introductions to people in your network – personal and professional

Social Interaction

- Extend invitations to events with other people

Valuable Data

- Provide business data about industry, competition, trends, changes, etc.

Political Advocacy

- Brag on them to others inside and outside of their company

Problem Solving

- Share insight on a problem they are facing that is outside of your core service offering

Personal Mentorship

- Take time to help them grow and learn from your knowledge and experience

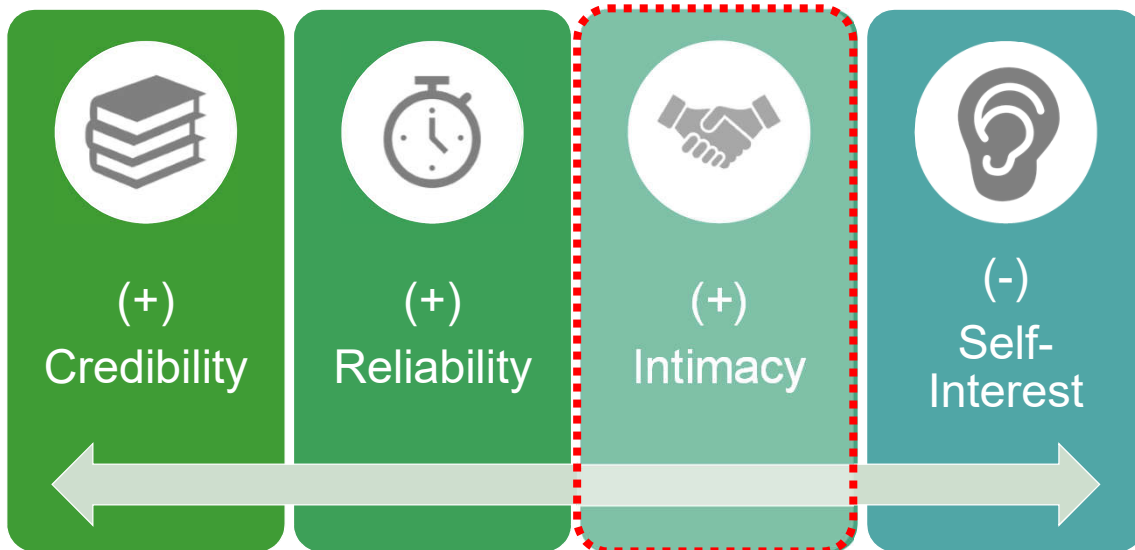
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The Components of Trustworthiness



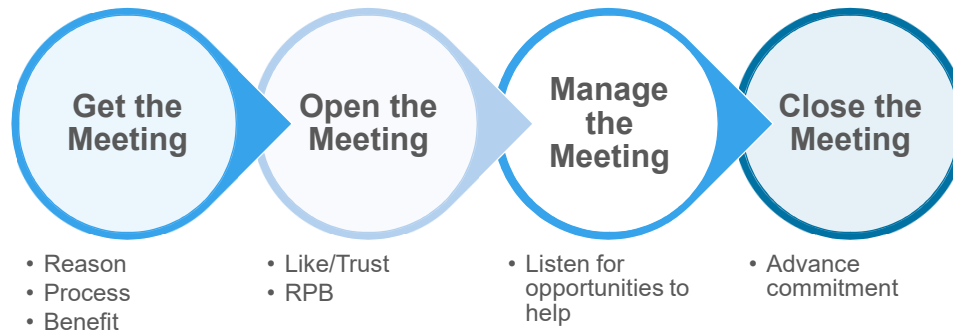
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Client-Centered Meetings



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Reason Process Benefit (RPB)



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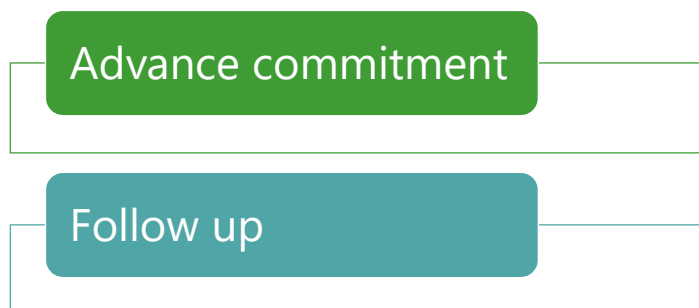
Manage the Meeting



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Close the Meeting



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The Client Action Plan



Set aside the next 90 days



Select your Top 20 clients



Compile key information



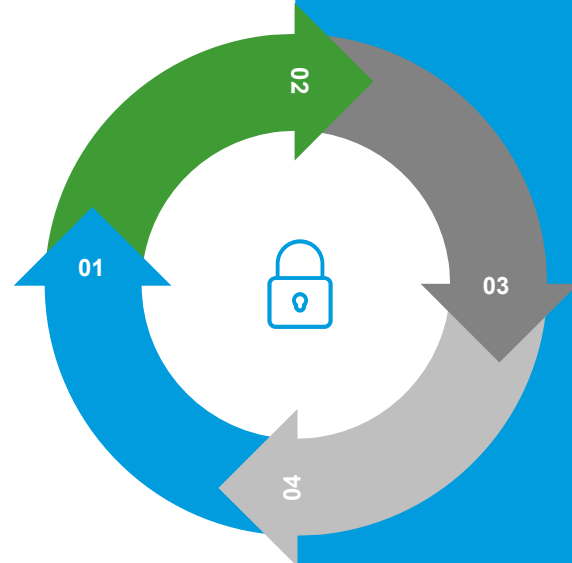
Execute the action plan



Follow up as promised



Get results



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Getting Referrals



Why Referrals?



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Why Clients Don't Refer...



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How do we stimulate referrals?



Ask



Enhance their **revenue**



Regular **contact**



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Strategy 2 - Identify “B” clients and turn them into “A” clients



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Who are your “A” and “B” clients?

- Top 5% of your clients = 50% of your firm’s total revenue
- Next 15% of your clients = 30% of your firm’s total revenue



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How do we move our “B” clients to “A” status?

- Understand their business
- Be proactive
- Variety of services
- Convenience
- Fair fees



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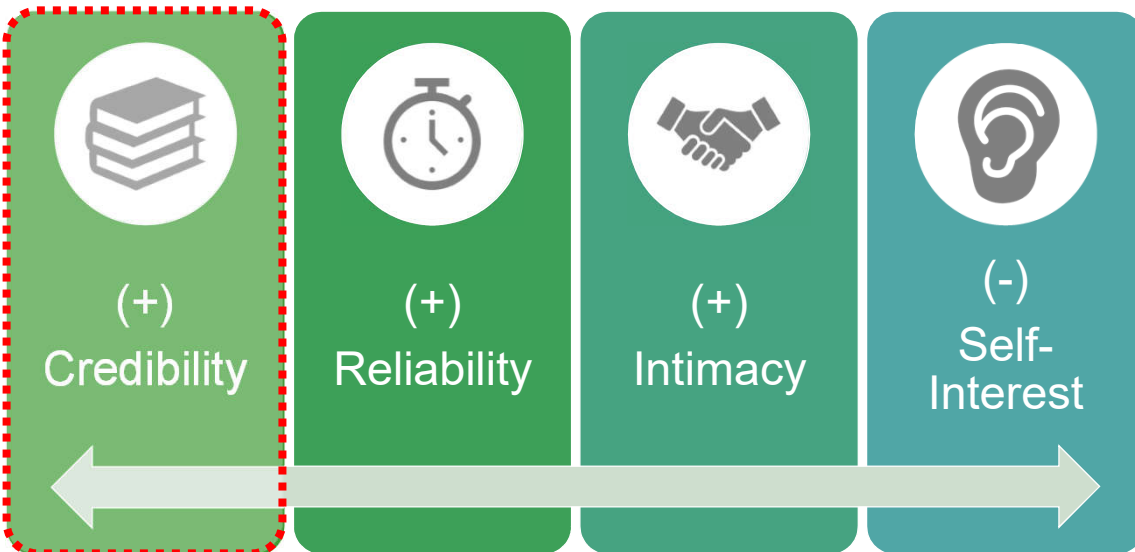
How do we
understand
our **client's**
business?



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The Components of Trustworthiness



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How do we understand our client's business?



Attend
industry
meetings



Read industry
publications



Industry
CPE/CLE



Ask
questions

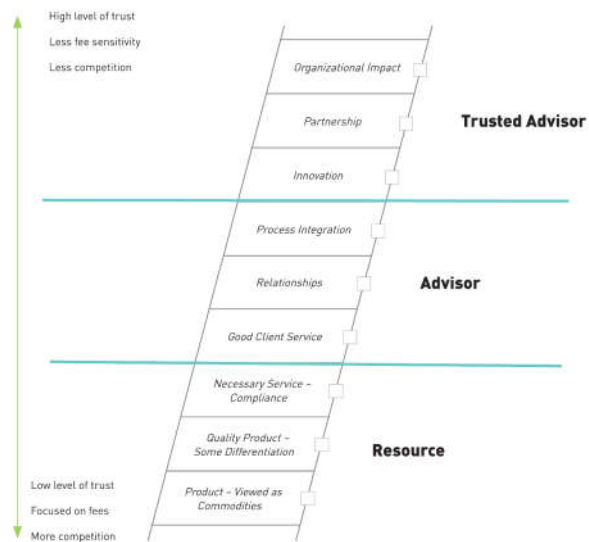


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Walking up the Value Ladder

- How did you get your “A” clients to move up the value ladder?
- The higher they move the more valuable the relationship



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Smile and
have fun!



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Questions? Let's Connect!



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