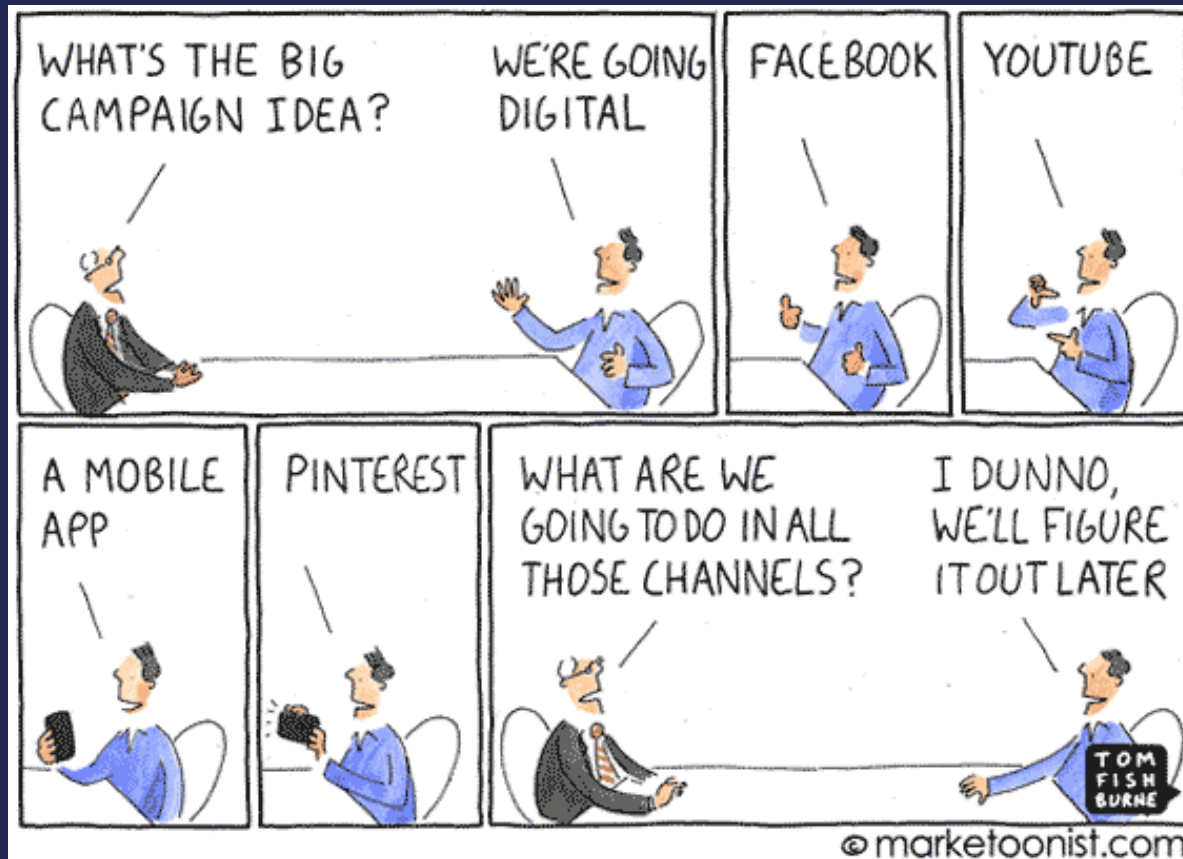


MARKETING PROFITCENTS TO ENHANCE FIRM VALUE

Best practices for acquiring new clients and cross
selling to grow profits

profitcents®





Course Agenda

The importance of advisory services

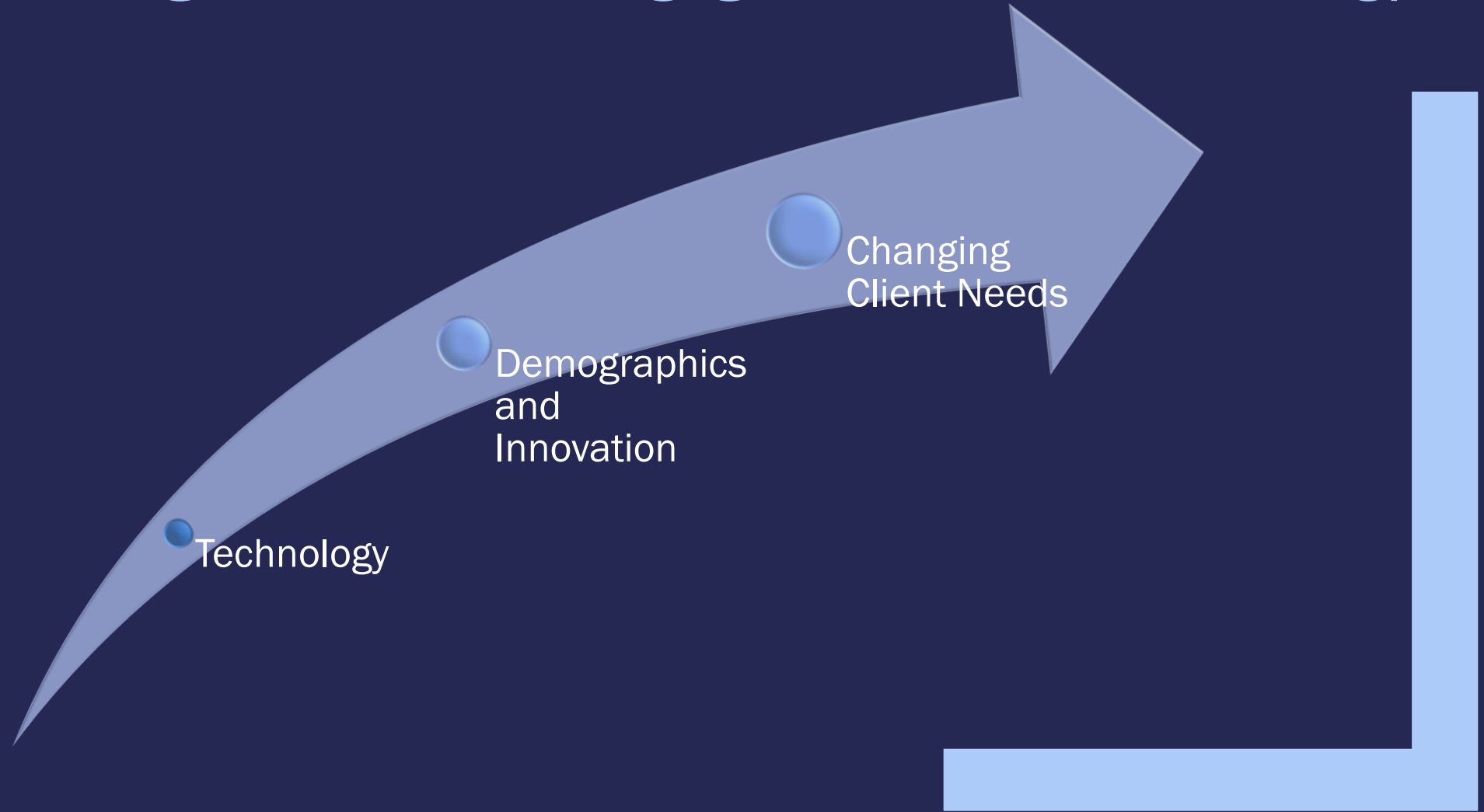
Trends in marketing

Marketing best practices

Qualifying the client. Qualifying the need.

Creating your brand

WHERE IS THE INDUSTRY HEADING?



ProfitCents University – What SMBs need from accountants





Communicate



Help & support



Highlight your expertise



Advisory & consulting services

Marketing
Communication
to Help Your
Clients

Thought Leadership Through Content Marketing



Identify your
expertise



Industry
experience



Blogs & articles



Encourage
encouragement

SOCIAL MEDIA

Network with clients and colleagues

Share your involvement in the community

Develop a company and personal brand

Testimonials and client stories

Let people know what you've been doing!

profitcents®





Email Marketing Campaigns

- One of the most effective ways to connect
- Send thoughtful, well-crafted communications
- Ensure your communications are helpful and clear

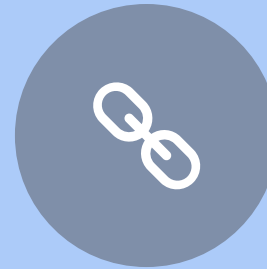
Website Updates & Webinars



POST ALL FIRM
UPDATES



KEEP CONTACT
INFORMATION
CURRENT

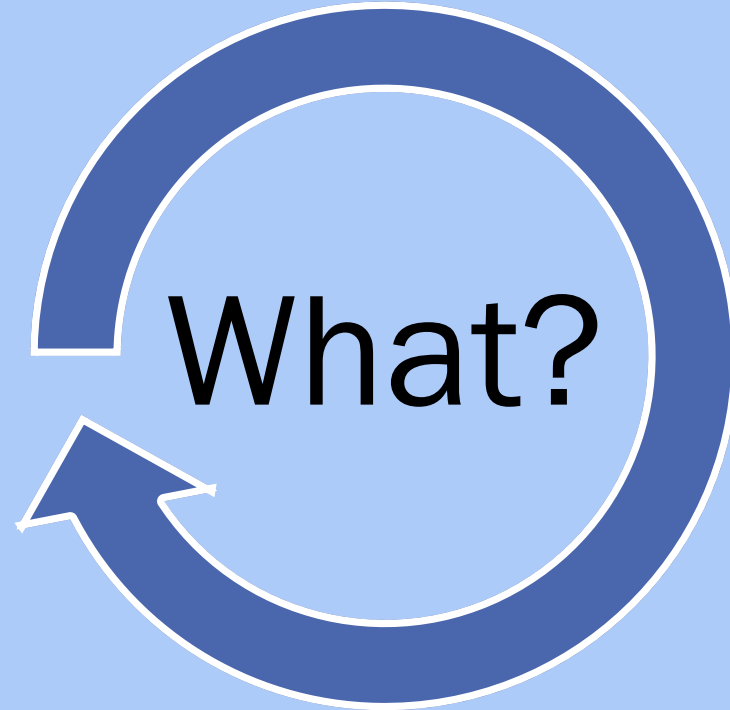


HELPFUL LINKS &
RESOURCES



PROMOTE YOUR
ADVISORY SERVICES

Qualifying the client. Qualifying the need.



- Don't overpromise
- Emphasize your expertise and impact
- Identify services

Marketing Best Practices

New
clients

Develop healthy relationships and foster “A” clients from the starts

Existing
clients

Cement the relationship by cross-selling additional services

High-
value
clients

Current “A” clients that you continue to maintain

Qualifying the client. Qualifying the need.

Don't
overpromise

- Develop an industry niche or a few advisory-focused specialties and start with clients who would benefit

Emphasize
your expertise

- Showcase how you have helped other clients. Call attention to your impact on the bottom line both strategically and financially

Identify
services

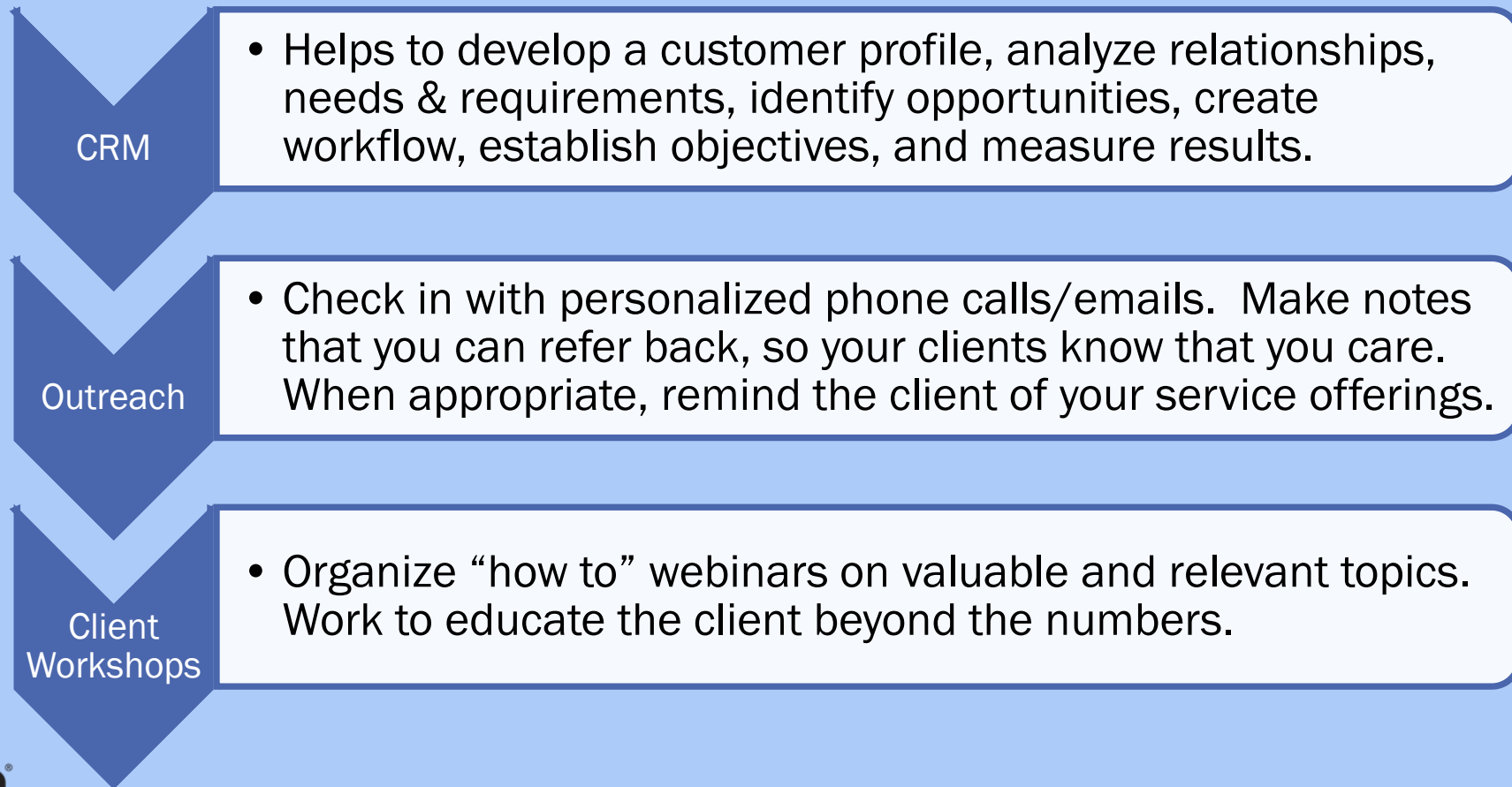
- Clients need insights that you can provide, even if they don't realize it. Clients are more likely to stay with a firm if they feel their best interests are being looked after.

Qualifying the client. Qualifying the need.

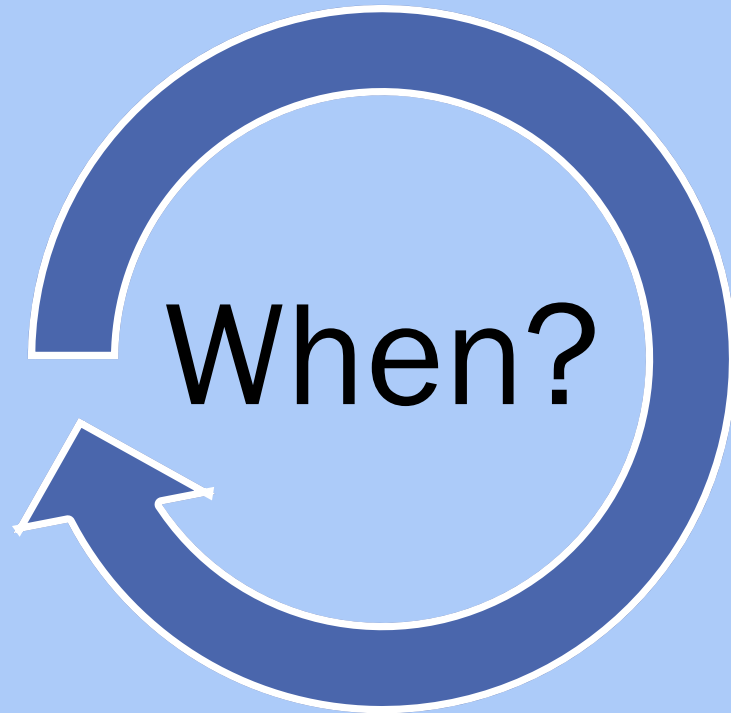


- CRM
- Outreach
- Client Workshops

Qualifying the client. Qualifying the need.



Qualifying the client. Qualifying the need.



- Routine client meetings
- Between busy periods
- Marketing messaging

Qualifying the client. Qualifying the need.

Client Meetings

- Captive audience to market services by simply making conversation. Be intentional and follow-up

Busy periods

- Use this time to meet with clients and develop strategy plans. Take this time to establish regular contact.

Marketing messages

- Keeping clients up to speed with services that can help their business.

Qualifying the client. Qualifying the need.

Think of questions related to:

Liquidity

Profits and Profit Margin

Sales

Borrowing

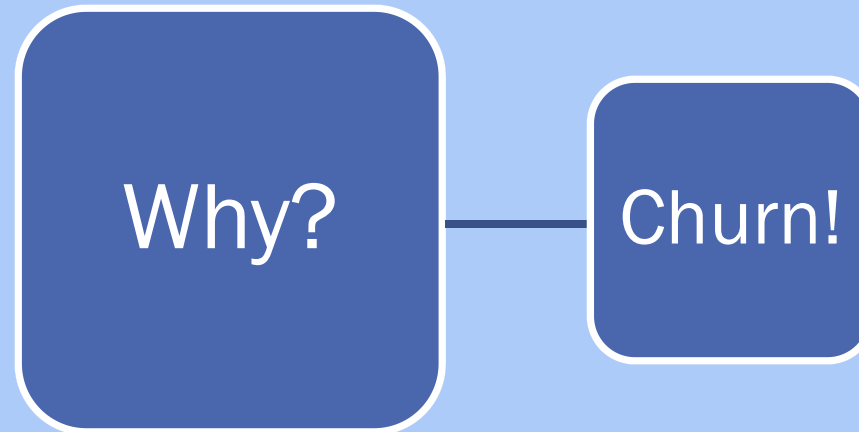
Asset Management

Employees

TIP:

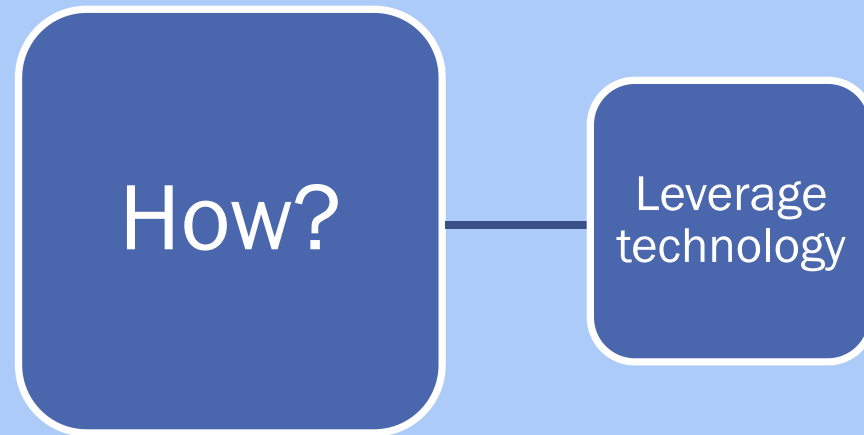
Create your own checklist to give to your clients, so that the client can take it with them as a reminder of the additional needs that they have

Qualifying the client. Qualifying the need.



If you don't, someone else will – Studies show that 4/10 buyers of accounting services are interested in additional service lines. If they don't know what you provide, they may look elsewhere.

Qualifying the client. Qualifying the need.



Clients expect their firms to stay current by investing in technology resources.

Cross-selling accounting services

1. Identify your services

Service Offerings
Accounting
Budget Forecasting
Cash Flow Forecasting
Reviews/Compliations
Auditing
Financial
Forensic/Fraud Investigation
Bookkeeping
Financing Services
Banking/Lender Relations
Alternative Financing
Business Planning & Evaluation
Asset Management Analysis/Planning
Strategic Growth/Planning
Succession Planning
Mergers & Acquistitions Help
Other Consulting
Financial Planning
Navigating Health Care Compliance
Retirement/Estate Planning
Debt Counseling
Charitable Giving Planning

Cross-selling accounting services

2. Identify your clients

Client/Company Name	Areas of Concern
Captain Paul's Fish Shack	Profit and sales growth
Kristina's Kupcakery	Inventory management
Hamilton's Wine Bar	Inventory management; overhead expenses
Crafts by Cindy	Succession planning

Cross-selling accounting services

3. Determine potential offerings

Service Offerings	Captain Paul's Fish Shack	Kristina's Kupcakery	Hamilton's Wine Bar	Crafts by Cindy
Accounting				
Budget Forecasting	O	X	X	O
Cash Flow Forecasting	O	X	X	O
Reviews/Compliations	X	O	X	O
Auditing				
Financial	O	O	X	X
Forensic/Fraud Investigation	O	O	X	O
Bookkeeping	X			
Financing Services				
Banking/Lender Relations	O	O	X	O
Alternative Financing	O	O	X	O
Business Planning & Evaluation				
Asset Management Analysis/Planning	O	X	O	X
Strategic Growth/Planning	O	X	X	X
Succession Planning	O	X	O	X
Mergers & Acquistitions Help	O	X	O	X
Other Consulting				
Financial Planning	O	X	O	X
Navigating Health Care Compliance	N/A	N/A	N/A	N/A
Retirement/Estate Planning	N/A	O	O	X
Debt Counseling	O	X	O	O
Charitable Giving Planning	N/A	N/A	O	N/A

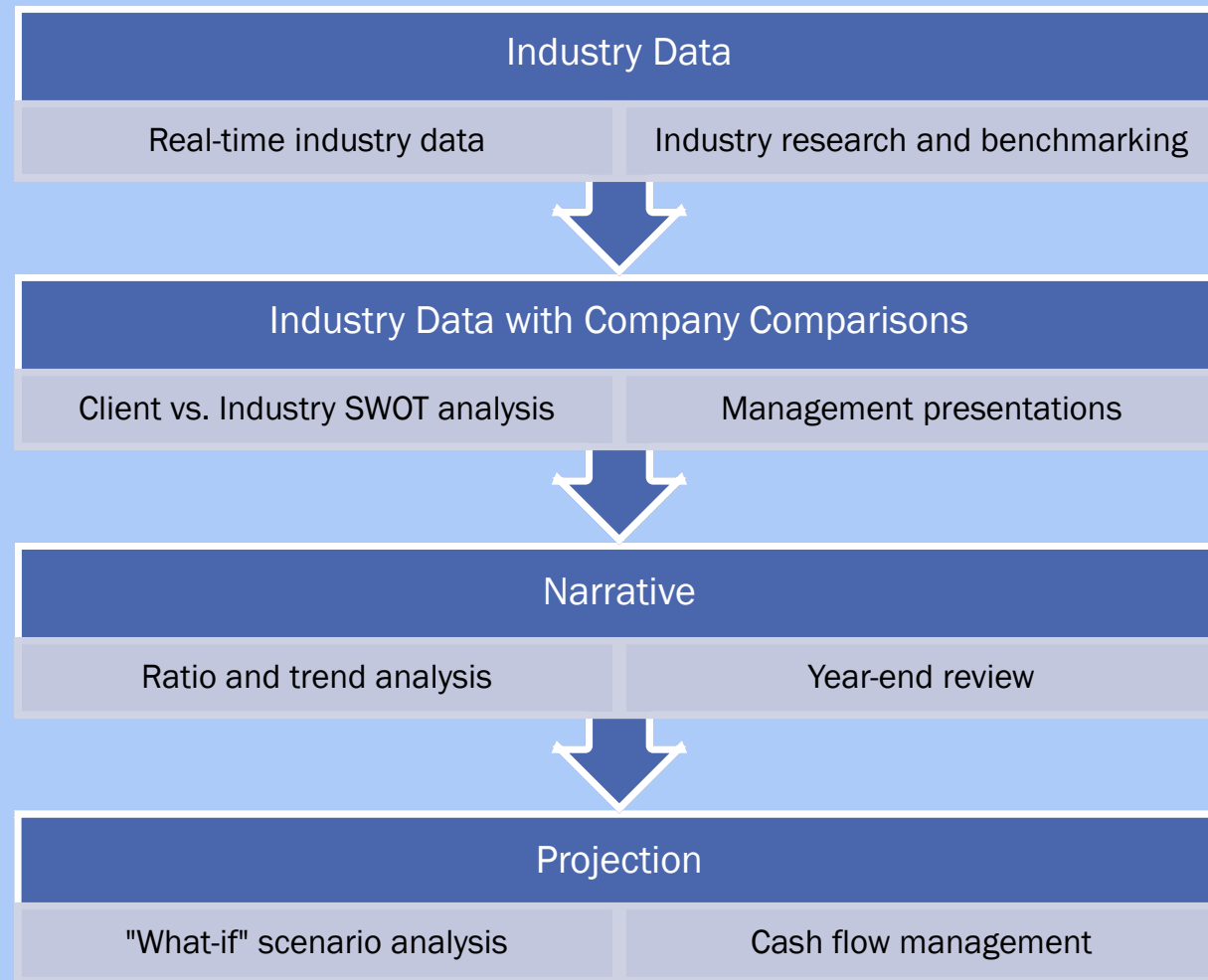
Cross-selling accounting services

4. Determine the plan

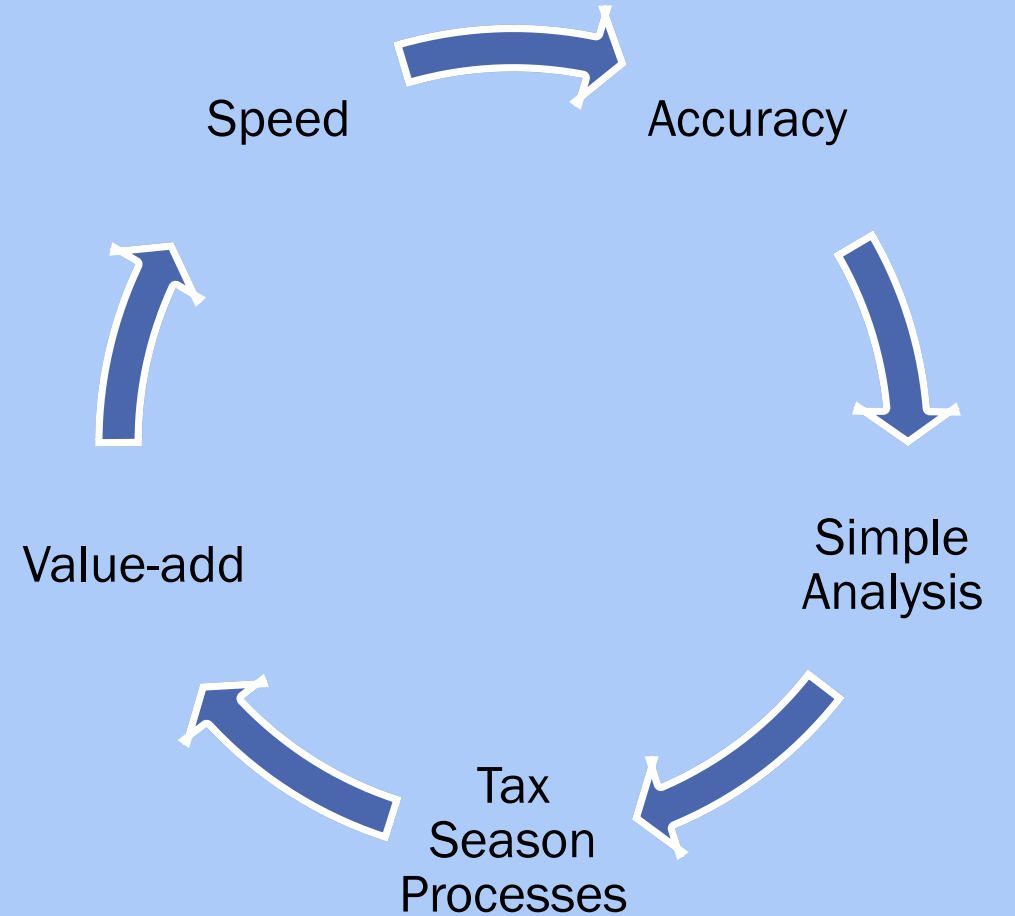
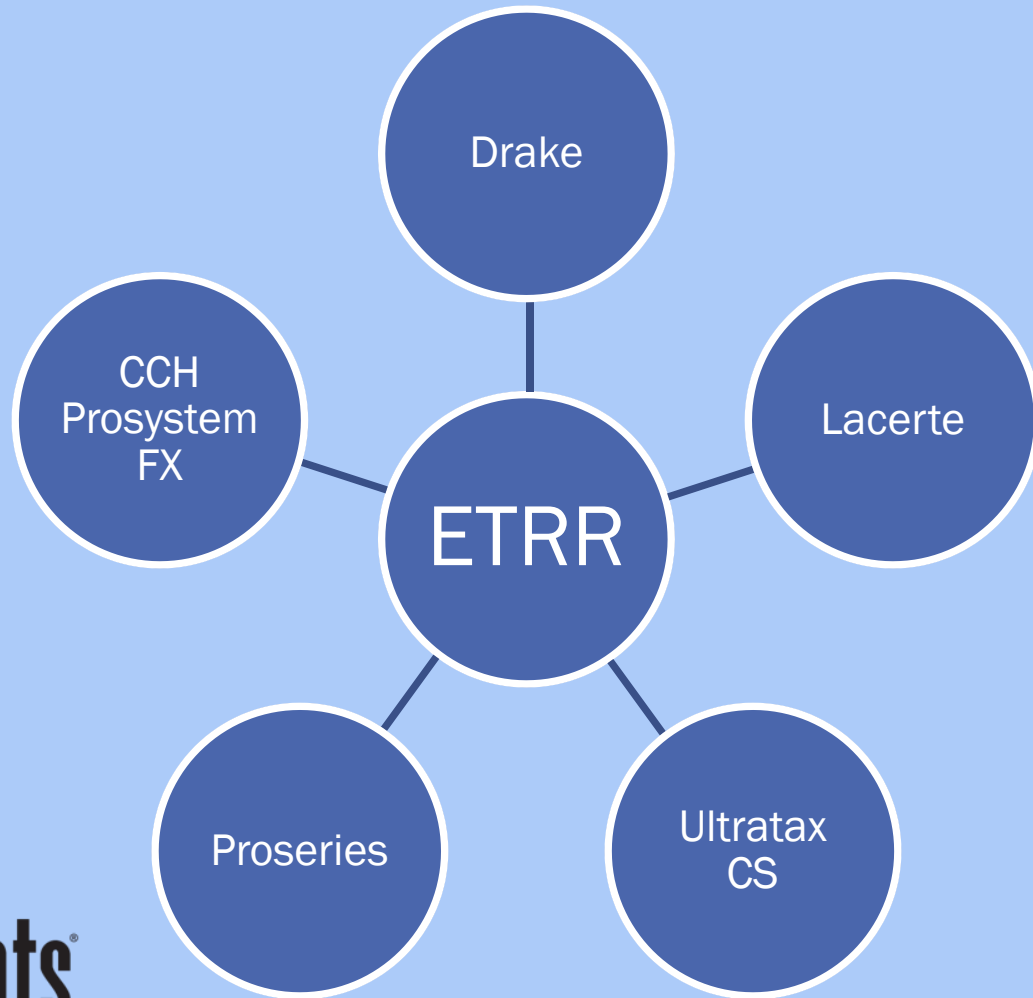
Client/Company Name	Areas of Concern	Assigned To	Notes	Follow Up Date
Captain Paul's Fish Shack	Profit and sales growth	Chad Wright		6/15/2020
Kristina's Kupcakery	Inventory management	Amelia Jeffrey		7/15/2020
Hamilton's Wine Bar	Inventory management; overhead expenses	Amelia Jeffrey		8/1/2020
Crafts by Cindy	Succession planning	Chad Wright		6/30/2020

Cross-selling accounting services

5. Utilize your resources



Cross-selling accounting services



Creating your brand



WHERE DO YOU WANT
TO BE IN TWO YEARS?



WHO ARE YOU?



MOMENTUM →
PREDICTABLE GROWTH

Creating your brand

Develop a marketing plan



Identify your target



Develop goals



SWOT analysis

Creating your brand

Networking is key



Get your business noticed



Seminars and conferences



Follow up with potential clients



Run a workshop



Reach a
broader
market

Automation

Cloud-
based
applications
are now the
standard

Flexibility,
security,
and cost
savings

Creating your brand

Utilize technology



DON'T LET A CLIENT
FORGET ABOUT YOU!



MAKE IT PART OF
YOUR ROUTINE

Creating your brand

*Follow up with
clients*



SURVEY YOUR
CLIENTS

Creating your brand

Get referrals from your clients



YOUR CLIENTS INTERACT
WITH BUSINESSES TOO



RECOMMENDATIONS ADD
VALUE TO YOUR REPUTATION



BE PROACTIVE

Marketing Mishaps

Failure to Launch

Make new
technology
optional

Wait for
the client's
request

Send a
report
without
discussing
it

Charge for
a report
without
context

Bottom/up
approach

Marketing Strategies: Key Takeaways



Create a checklist



Communicate!



Utilize technology



Publish content



Update frequently



Share and post



NEVER STOP MARKETING

Case Study: Cross-Selling Additional Services with ProfitCents



Overview



Challenge



Solution



Results

“ Once I put that ProfitCents report in front of them and they look at it and the narratives the report generates, I generally don’t have to say much. The report helps them cross that barrier and see the need for the additional services. ”

Amit Chandel

Focus CPA Group Inc.

THANK YOU!

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profitcents

