

# SELL Isn't a Four-Letter Word

It's no secret that the typical accountant doesn't like to sell. The problem is that firms need to expand their client base to grow, or even stay in business. This requires accountants to sell.



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The ability to sell effectively can be cultivated and mastered. Selling is a step-by-step process you can learn, customize and continuously improve upon.

You don't have to be the most outgoing, enthusiastic person to be successful. All you need is to understand the basic sales process, develop and nurture a relationship, listen to your prospect, and have a genuine passion for what you are selling.

The bottom line is that your prospect has a problem, and you likely have the solution. All you need to do is educate your prospect on why your firm is the best provider of that solution.

## Sales 101

To have a successful outcome, you must take your prospect through the buyer's journey. Here is a basic seven-step process:

### 1. Invest the Time to Prepare

Make sure you are prepared for a sales call:

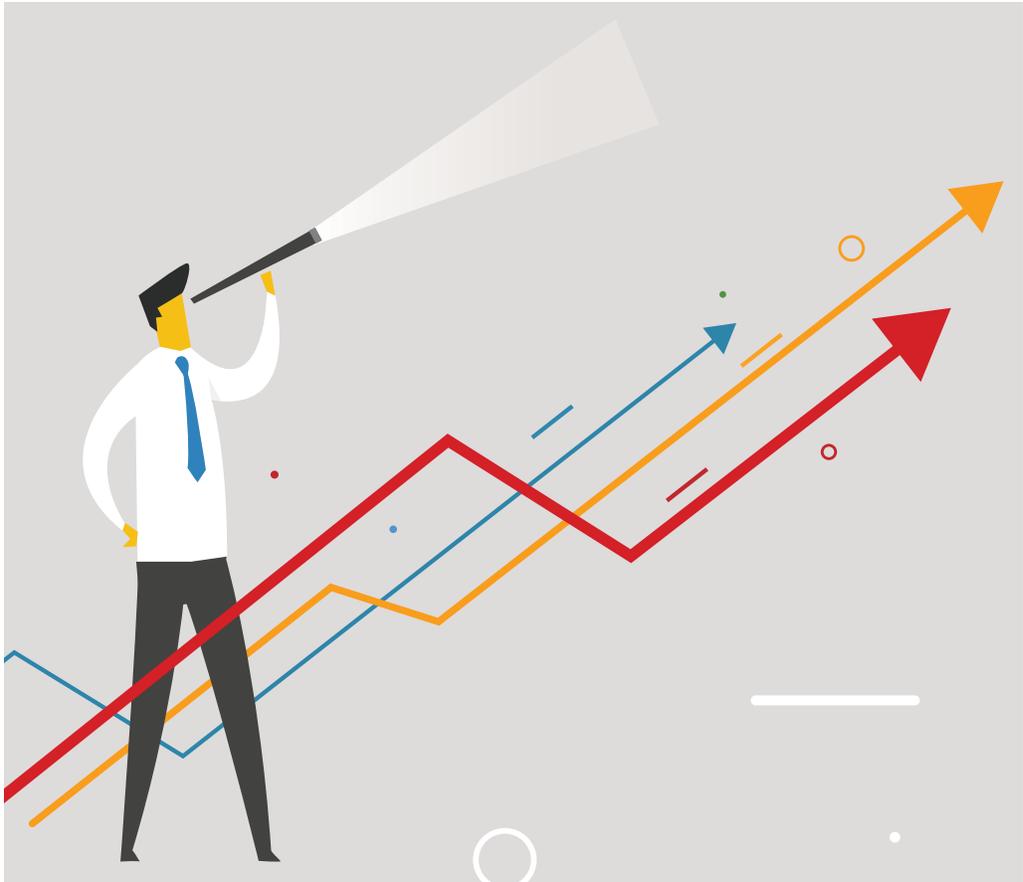
- Understand your firm's service offerings.
- Know the unique value you bring to a relationship.
- Be able to clearly articulate your value proposition.

- Research the companies and people you plan to meet. This includes reading about them on social media and reviewing their LinkedIn profiles. See if prospects are connected to anyone you know and reach out to mutual connections for further insight.
- Develop a list of potential hot buttons commonly faced by companies in a prospect's industry.
- Identify possible solutions offered by your firm.
- Prepare a list of potential objections and your responses.
- Package marketing collateral to showcase your expertise. Include brochures, team biographies, testimonials and relevant articles.
- Have a positive mindset.

### 2. Build a Relationship

The first few minutes you spend with a prospect set the stage for the rest of your interaction. First impressions are everything. Your goal is to develop relationships with prospects based on trust.

- Be confident and professional, but also personable.
- Mirror their speech and behavior.
- Begin with general questions and small talk.
- Show genuine interest in your prospects and their business.
- Notice and comment on their office environment.
- Find some common ground on which to relate.
- Be seen as an expert, to build trust and respect.



- Confirm that the answer you provided has overcome their objection by asking if they agree.

**6. Close**

Prospects are not ready to buy until you have presented a solution to their problem, educated them on the value they will realize by working with you, and addressed all of their objections. It is important that you do not close too soon. Ask yourself:

- Does the prospect agree that there is value in your service?
- Does the prospect understand the benefits of working with you?
- Are there objections you still need to address?
- Are there other factors that could influence the decision to buy?
- Have you minimized the risk involved in engaging your firm?

Here are some questions you can ask to determine if it is time to close:

- Would you like me to help you implement a [solution]?
- Should we get started?
- Can I send you an engagement letter?

**7. Deliver Awesome Client Service**

Keep in close contact with your new clients to ensure that they are happy with the decision to hire your firm and, most importantly, that you delivered the solution promised during the sales process. Over-promising and under-delivering can ruin your relationships. Invest the time to exceed your clients' expectations.

Selling is really about helping a prospect find a solution to a problem. Approaching sales with a helping mindset can ensure that, at least in your mind, SELL isn't a four-letter word. 🧩

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**3. Discuss Problems, Needs and Wants**

Ask open-ended questions to discover your prospects' hot buttons, needs and wants. Also ask why they are interested in your firm, who is involved in the decision-making process, and what their selection criteria are so you know where to focus.

- Let your prospects talk. The longer they talk, the more insight they will provide you (80/20 rule).
- Ask open-ended questions to get them talking and ask clarifying questions to follow up on their responses.
- Listen intently and repeat back information to acknowledge that you understand.
- Remember that the meeting is about finding a solution to their problem, not about how wonderful you are.
- Know more than enough to discuss relevant business and industry hot topics.

**4. Present Your Solution**

Once you have a solid understanding of what your prospects are looking for, or what issue they want to resolve, you can present your solution.

- Explain how your firm will solve their problem or meet their needs.

- Illustrate your points by telling anecdotes about the solutions you have provided to clients with similar issues.
- Focus on the benefits they will realize by working with you and your firm.
- Watch their behavior as you speak. Ask further qualifying questions in response to their body language and comments.
- Give prospects an opportunity to ask you questions or provide feedback on the solution you discussed.
- Ask closed-ended questions to gain agreement (aka, the mini-close).

**5. Overcome Objections**

As you present the value of working with your firm, ask open-ended questions to uncover objections and monitor your prospects' body language. Expect objections to arise and be ready to address them.

- Repeat the objection back to them to ensure you understood them correctly.
- Empathize with what they have said and give a thoughtful response.
- Offer proof that you have the solution by presenting statistics to support your claim, telling a client success story, providing a report, etc.