



The Knowledge Your Clients Want You To Have

and most powerful

The Easiest Marketing Campaign Ever!

What makes it easy?

- Doesn't cost a lot
- Easy to implement
- Easy to involve everyone on your team

What makes it so powerful?

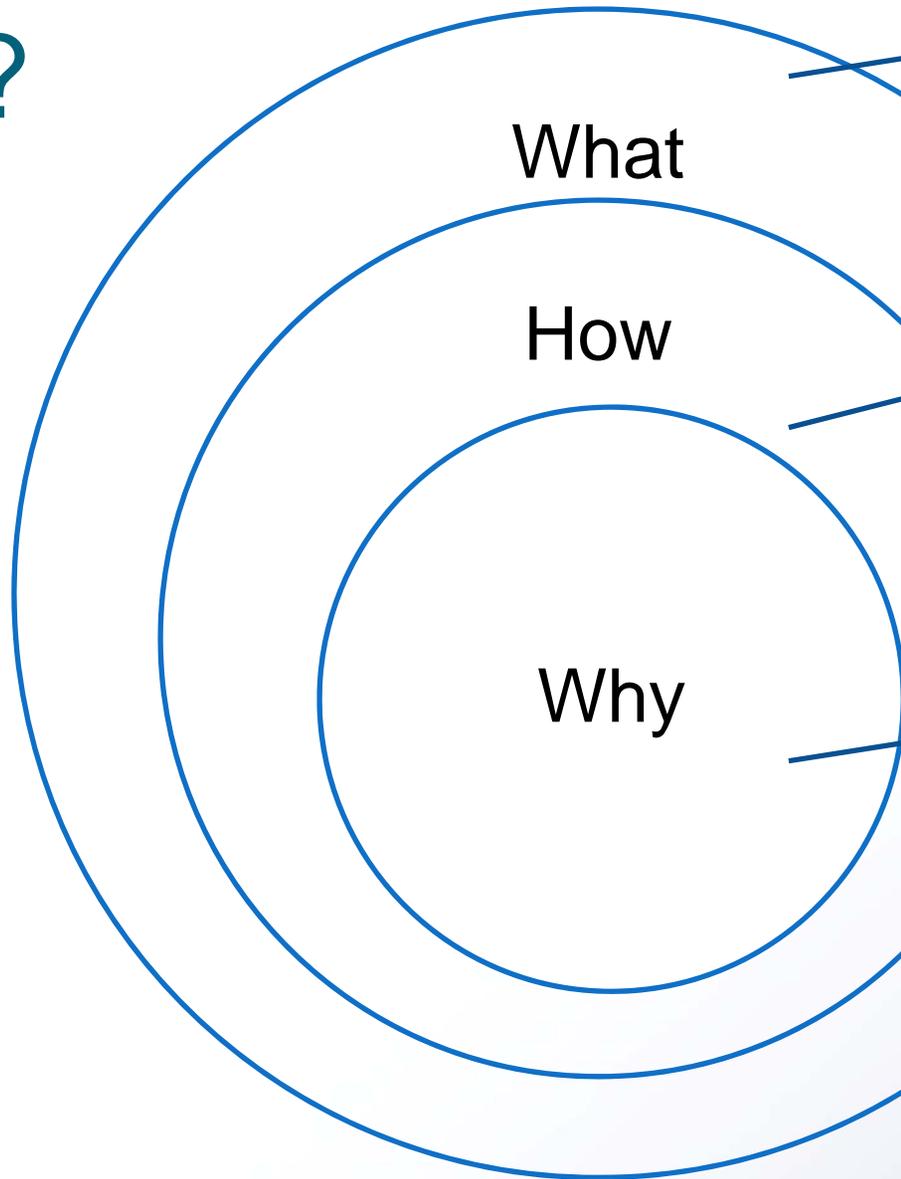
- Strengthens client relationships
- It clients something to “Rave” about
- Increases the business acumen of your team
- Your competitors can’t replicate it
- Stimulates a culture of curiosity

Before the process can work
you must . . . connect with

“why”

Why?

People don't buy what you do, they buy "why" you do it.



Provide Tax, A&A, and proactively support clients with advisory services

Continually look for new and better ways to serve client needs. Be Client Centric not Service Centric

Passionate about helping small businesses thrive

What was your favorite field trip?

- Girl Scouts, Boy Scouts
- School trips
- Mr. Roger's Curiosity Series
 - Crayon factory
 - Food processing

It's time to take your team on a business field trip

1. Client-Prospects Identified
2. Preparation
3. On-site field trip
4. De-brief with team
5. Post on-site meeting with client (pre-set within 48 hours of field trip)
6. Follow-up
7. Secure a commitment

1) Client – Prospects Identified

- Owner is positive and receptive
- Has 10+ employees
- Has a facility/office for on-site visit

Consider approaching non-clients for a field trip experience

2) Preparation

Invite the client/prospect

“We would like to come out and visit your company.

The reason is two fold:

- 1) We are working on growing the business acumen of our team
- 2) We want to understand more about how a business works

In exchange for giving us 1-2 hours of your time, we will meet as a team to brainstorm ideas that will help improve your business.

We would like you to come to lunch the day after the field trip so we can share those ideas and our observations with you.

This is a win-win for both of us. We learn more about you and you get the benefit of an educated brain trust focused on your well being.

2) Preparation

- Background meeting
 - Study website, industry association websites
 - Identify competitors – look for USP
 - Set up Google Alerts
 - Talk with client contact person in firm

 - Review client financial information
 - Input numbers into \$COPE IT! – analyze, develop questions

3) On-site visit

Roles & Responsibilities:

- On-site Coordinator – review physical logistic for the visit, make adjustments accordingly
- One primary facilitator to direct questions and solicit questions from the team
- Two scribes to capture interactions

3) On-site visit

Have questions ready:

- Tell us about your business; How you got started and your vision for the future
- Tell us what keeps you up at night
- Tell us what the next five years look like; challenges and opportunities
- Who are your competitors and what makes you better/different?
- If you were starting your business from scratch today what would you do different?
- What are you doing now that you hate doing? What would an ideal day look like for you?
- How involved is your team in management and decision making for the company?
- Describe the culture of your organization?
- How do you plan, how often, who is involved?
- How do you use financial information within the organization?
- Can you give us an example of how you overcame a major challenge?
- What is your exit strategy for the business?

3) On-site visit

Agenda

Part 1 – Owner presentation with Q&A

Part 2 – Tour facility with Q &A

On-site visit ends

Confirm meeting with client for the next day

4) Team Debrief

Select a different facilitator to lead session

- What are your overall impressions from the visit?
- What specific observations do you have?
- What needs more clarification?
- What ideas do you have that might help the client?
- Who do we know that can help the client?
- How can we help them?

4) Team Debrief

Scribe captures observations and questions for client for follow-up meeting

Team reviews client's numbers in \$COPE IT! – See if you can identify a driver/outcome that is relevant to field trip findings

Select a team member who will present the software in the follow-up meeting

5) Post on-site meeting with client

- Facilitator welcome (arrange lunch)
- Share observations
- Ask clarifying and quantifying questions
- Present ideas for improvement
- Present \$COPE IT! findings
- Invite the client to give feedback about the experience
- Is there anything else the client wants to share?
- If appropriate, offer help for resolving specific issues raised during the visit.

6) Follow-up

- DO NOT DROP THE BALL!
- ALWAYS ASSUME THE BALL IS IN YOUR COURT
- Prepare 1 page executive summary* from discussion from client
- Have key partner and/or manager hand deliver the summary within one week

*Summary Outline

- Thank client for opportunity to learn about their business
 - ❑ Summarize Identified Issue
 - ❑ Articulate key benefit associated with resolving the issue
 - ❑ Describe action to be taken or service to address issue
- Repeat for other issues; limit to top 3-4 issues only
- Restate your WHY and commitment to doing all you can to help them succeed.
- Promise to follow-up

Steps

1. Be clear about your “Why”
2. Select clients you love to work with
3. Follow the field trip protocol

Recommended Reading

- Getting Naked by Patrick Lencioni
- Three Signs of a Miserable Job by Patrick Lencioni

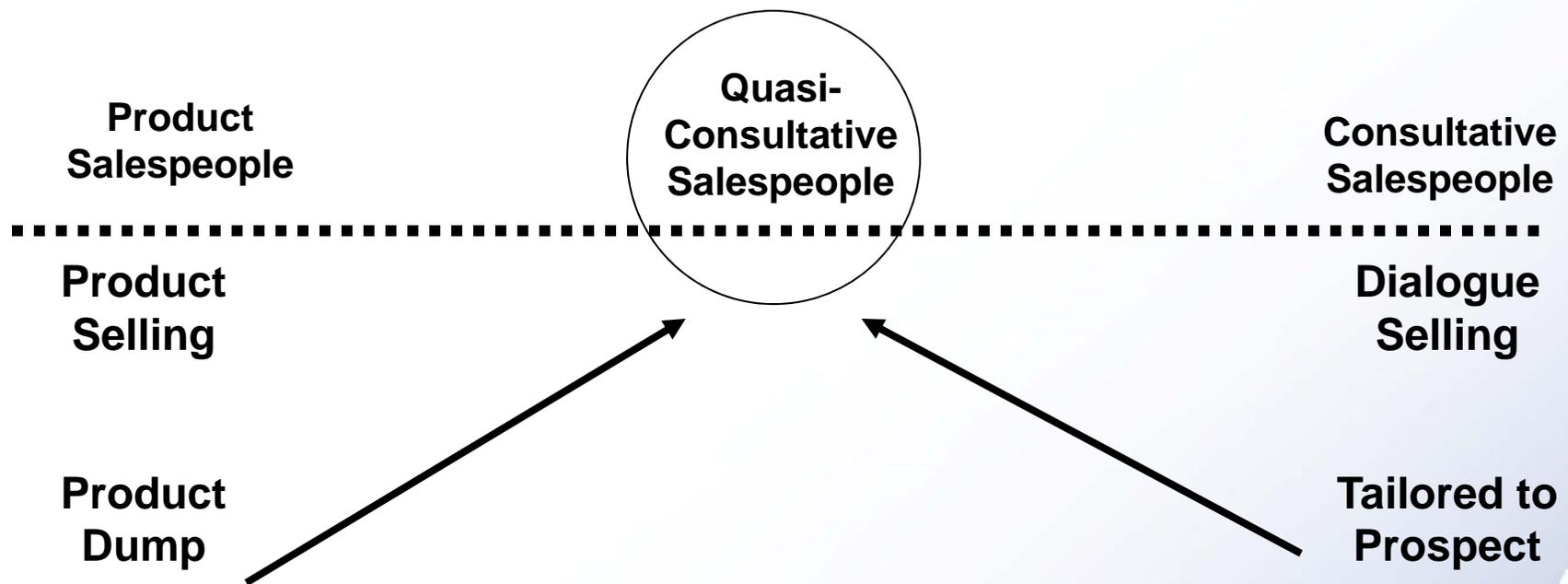
More Re-Framing

- What words come to mind when you hear the word: Teacher or Mentor?
- Think back to an experience with a teacher or mentor, what specific things did they do that made it so memorable (good or bad)?

Being a Professional

- It is the difference between accidental and predictable sales.
- Major upset in sports – was it skill or will?
- The game is won or lost, not on the field, but in our head.
- How important is attitude in sales?
- Would a coach send a team onto the field without practicing?

Product vs. Dialogue Selling



Subtle Distinctions:

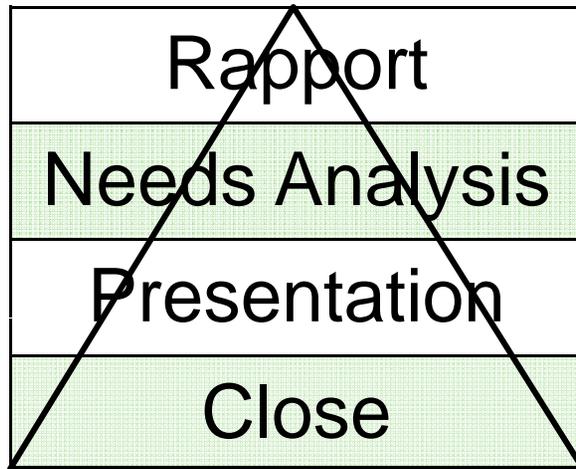
- **Level 1 – Commodity Level:** You get the business this time because of a particular feature or benefit that differentiates you from your competition
- **Level 2 – Credibility Level:** Having built credibility, you have an equal shot at the next piece of business
- **Level 3 – Partnership-Advisor Level:** You are the preferred provider, get the first call, the client looks to you with trust for advice.

Five Steps in the “Game”

1. Preparation
2. Rapport Building
3. Needs Analysis
4. Presentation
5. Close

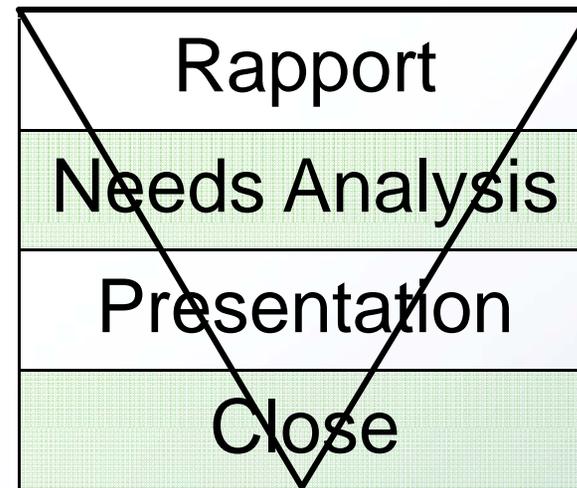
*The sales process is
just as important
as the product you sell*

Where would you rather spend your time?



Trying to Close?

Or



Building Rapport?

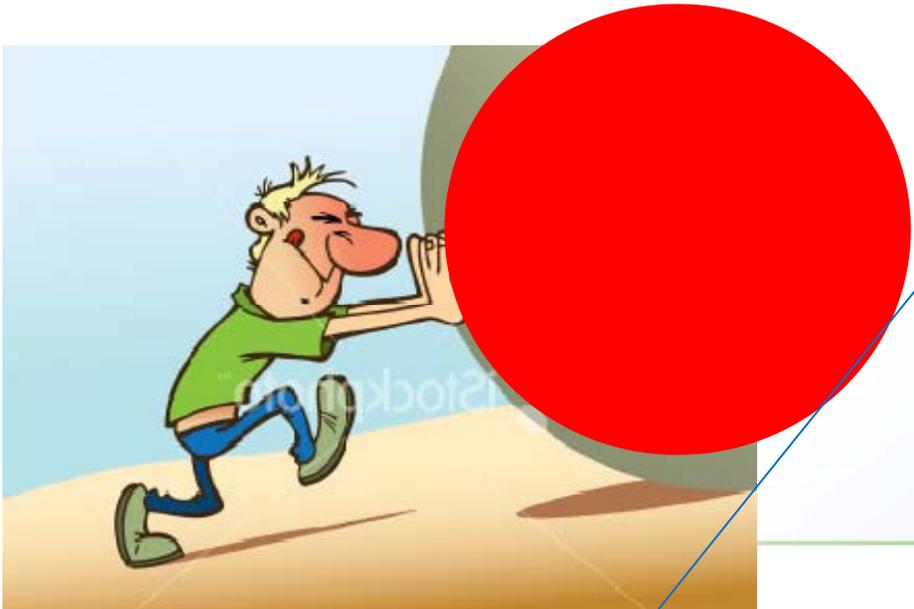


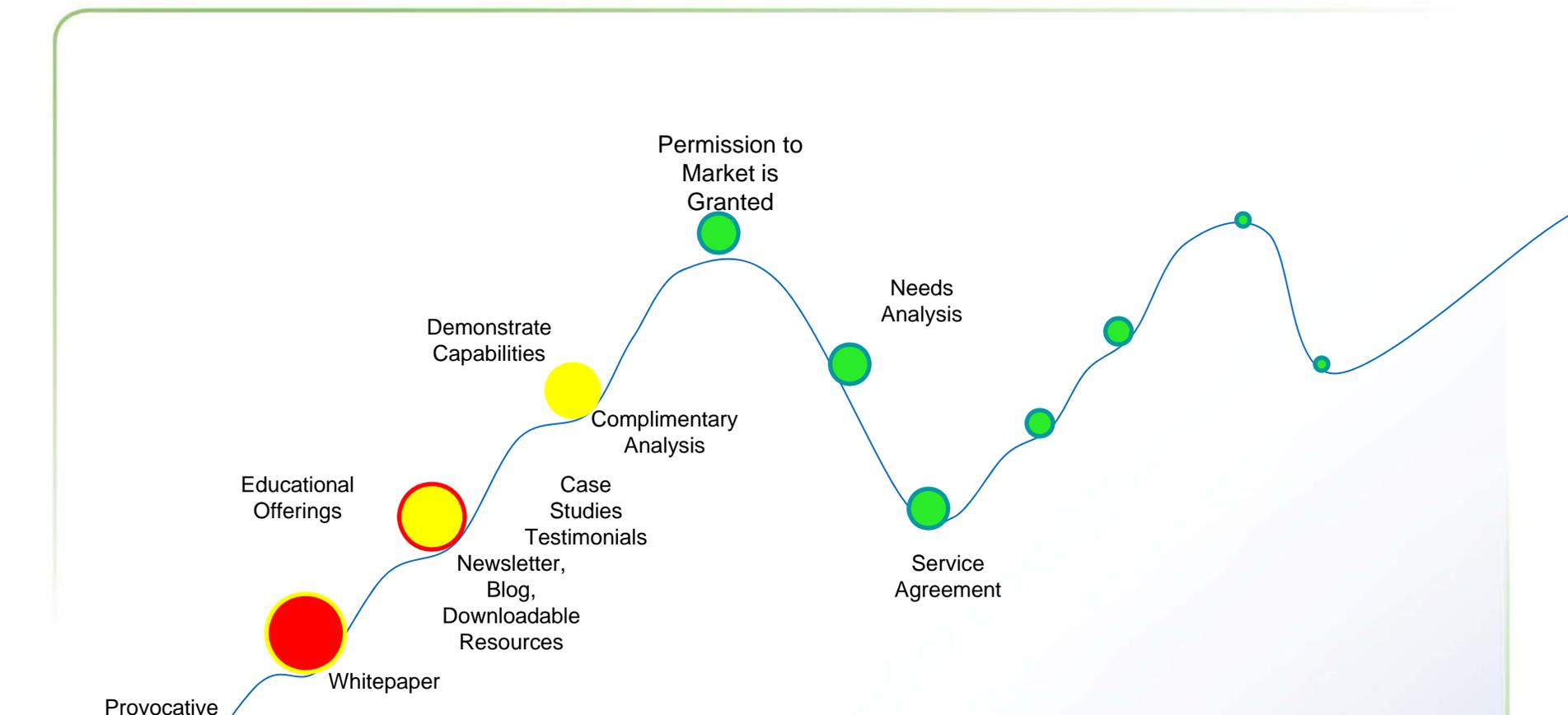
The Knowledge Your Clients Want You To Have

The Marketer's Dilemma

How can I get their attention if they are not paying attention?

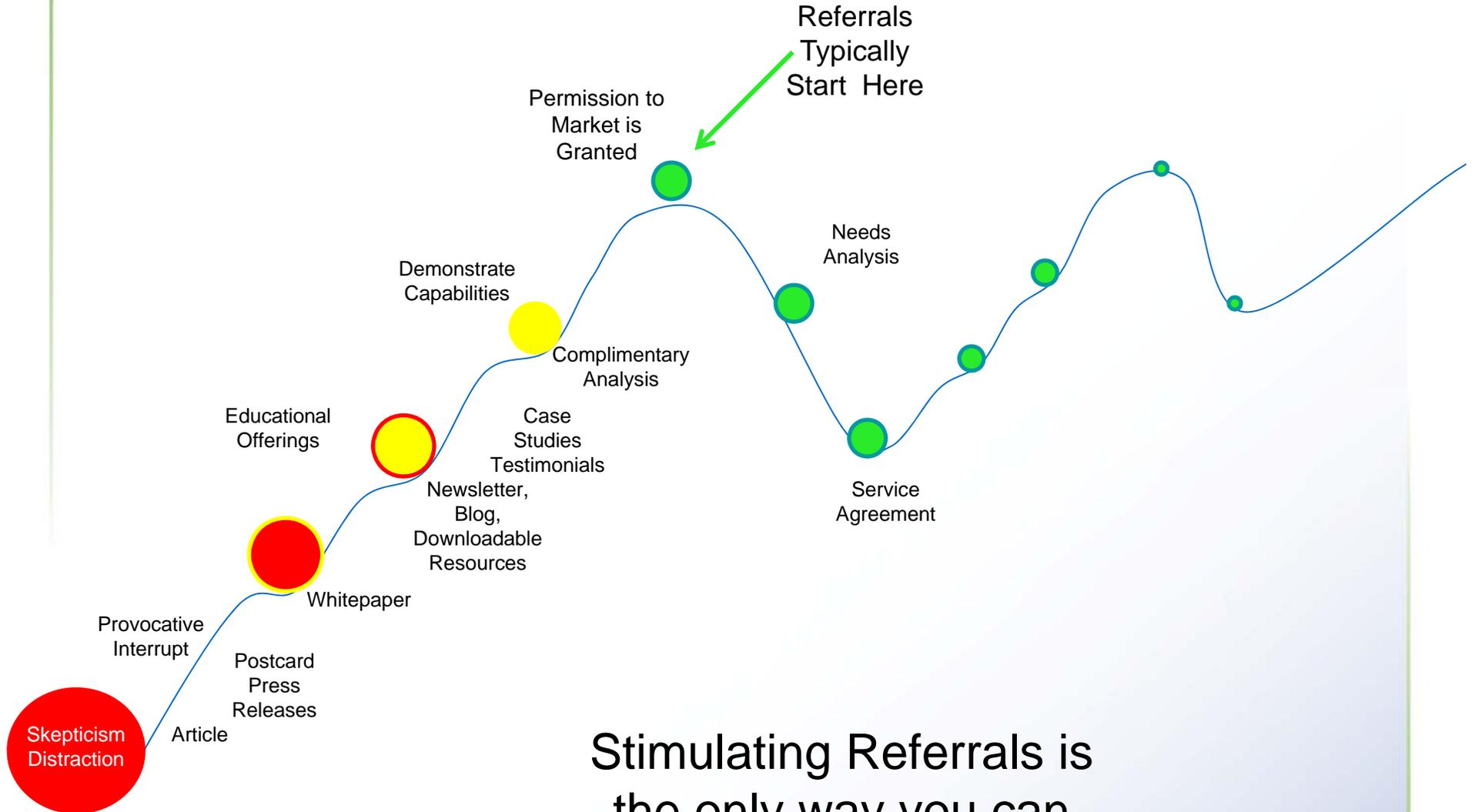
Yoo Hoo!
Look over
here!





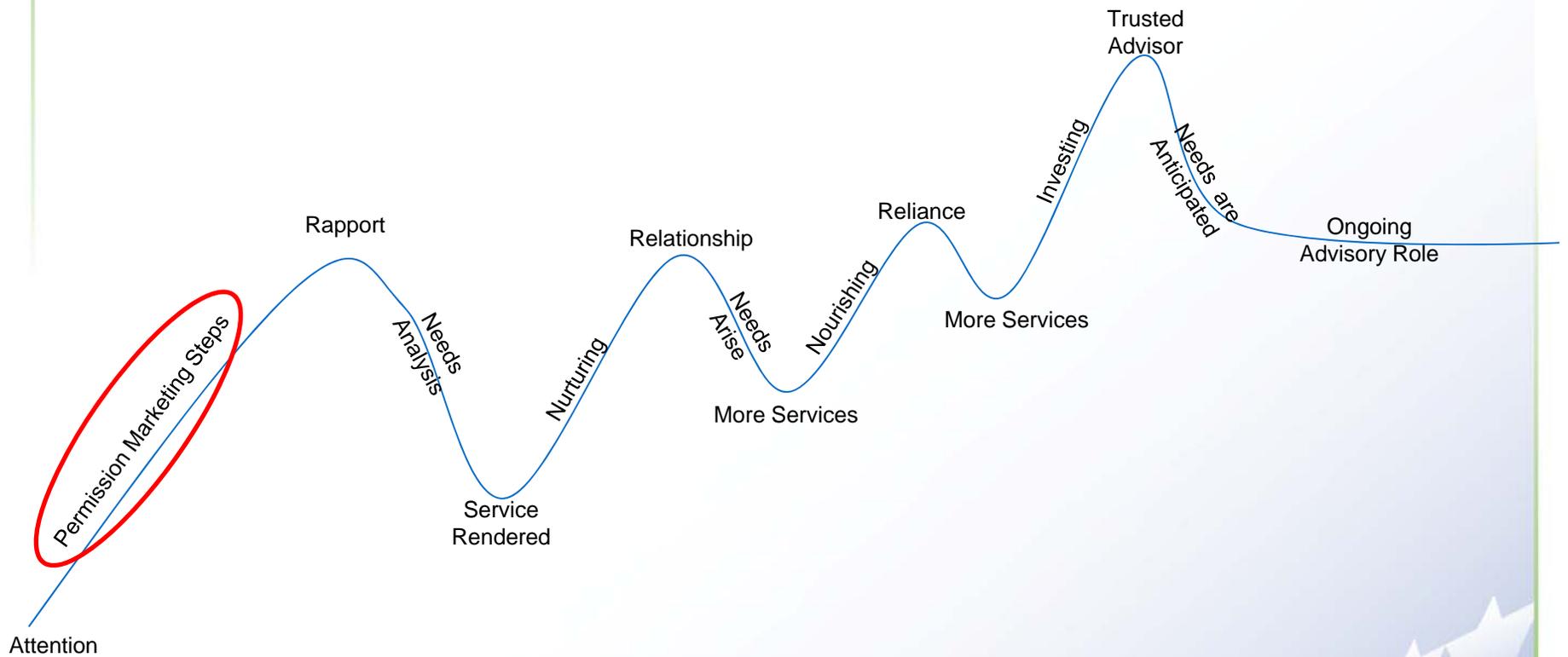
Permission Marketing is a Multi-Step Process designed to breakdown Skepticism and Breakthrough other Distractions.

Each step up the hill the prospect is willing to make is an indication of growing trust.



Stimulating Referrals is the only way you can short-cut the process

Client Development Life Cycle



The Knowledge Your Clients Want You To Have

Permission marketing

- Build a relationship
- Make a connection
- Establish trust

Best Practices

- Never leave a meeting without a plan for the next step
- A meeting isn't finished until you've sent out the follow-up

Sample Follow-up Letter #1

Dear Sam,

We talked about so many different things today, I wanted to capture the issues that you said were most important to ensure we follow-up on these sooner rather than later.

- 1) Succession
- 2) Lease coming up for renewal
- 3) Concerns about Key Managers
- 4) Personal Estate Plan

I'll call in the next few days to set up a time when we can get together. If something important comes up in the meantime, give me a call.

See you soon,

Woody

Sample Follow-up Letter #2

Dear Sam,

I appreciated the opportunity to catch up on what is happening in your business. Per our discussion I will be following up with you on this issues:

- 1) Succession; how do we develop the skills of the kids?
- 2) Lease – renewal; does it make sense to buy a building right now?
- 3) Estate Plan; do you have enough insurance coverage to make sure Betty will be well taken care of if you are not around?

I will have Susan give you a call to set up a time when we can meet again to discuss these issues in greater detail.

In preparation for our meeting:

- I will research salary comps for the kids current positions and what it would take to replace you with outside talent.
- I will also have John Jones, my colleague in commercial real estate, take a look at the commercial multiple listings to get a feel for what is out there.
- I will be contacting your insurance agent to get a summary of your current coverage and some options that may fit you better.

See you soon,

Woody

“I’ve been thinking about you”

Google Alerts

- Get everyone in your firm to follow a couple of your top clients

Sample “I’ve been thinking about you.”

Hi Sam,

It was great seeing you yesterday at lunch. You briefly mentioned you had some concern about the cash flow of the business and shrinking margins. I woke up last night thinking about what might be the cause of the shift in your situation. With your permission, I would like to do some analysis on your financials and review some of your management reports while you are on vacation so that when you return we can review the numbers and figure out where you need to focus your energies to address the situation. If you agree, please let your office manager, Kate, know that I will be contacting her for the most recent set of internal management reports.

I hope you have a great vacation in Aruba with Ann and the kids. Relax and come back refreshed.

See you soon,

Woody

Slide 38

GW1

I see this interaction as less about driving them to do something and more about paying attention to them.

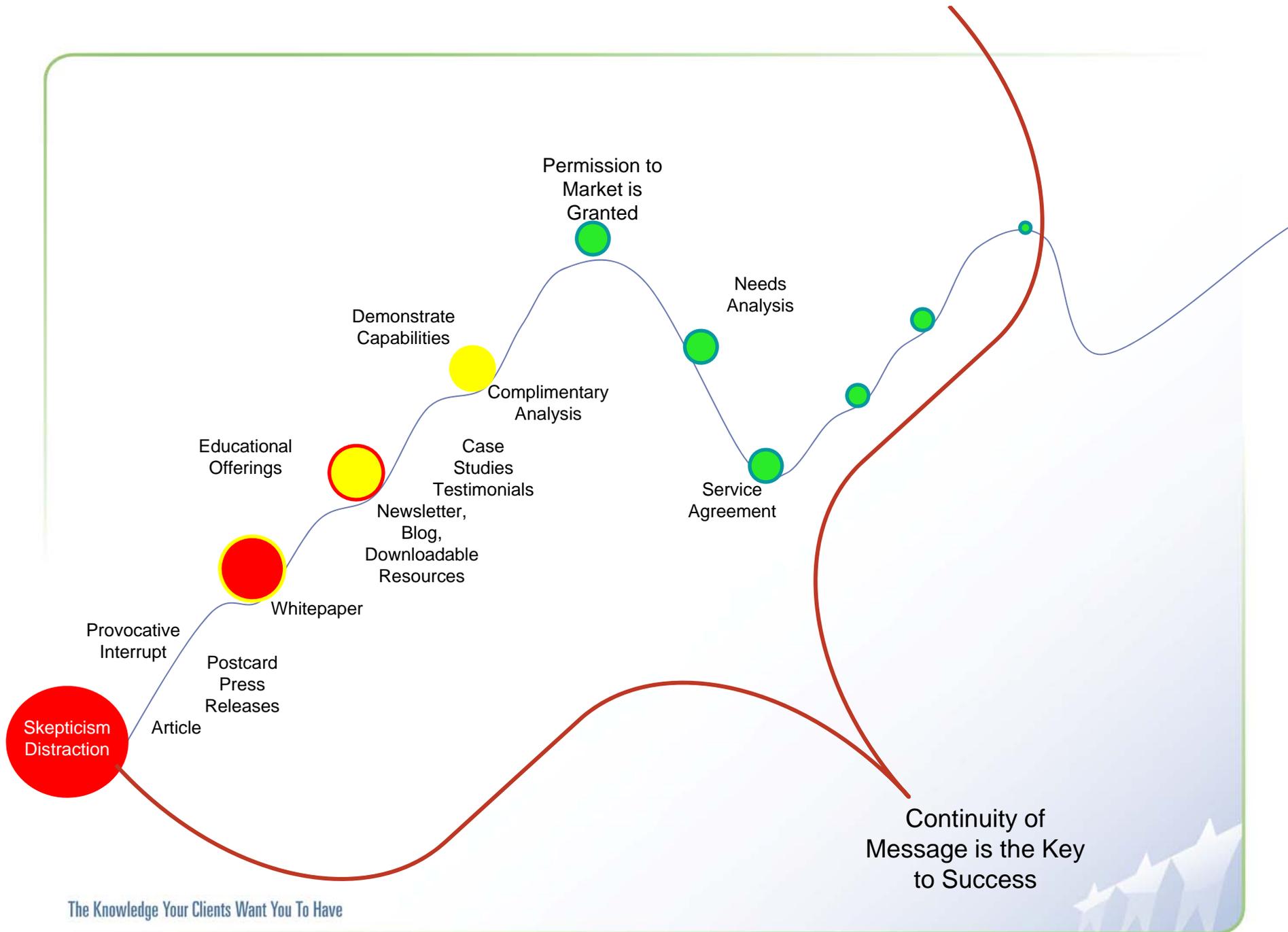
I see you've been invited to speak at the rotary next week. That's great.

I saw this article about _____ - thought you might be interested.

Take care,

Geni

GeniW, 5/13/2009



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Client Development Life Cycle

Messaging continues through client life cycle



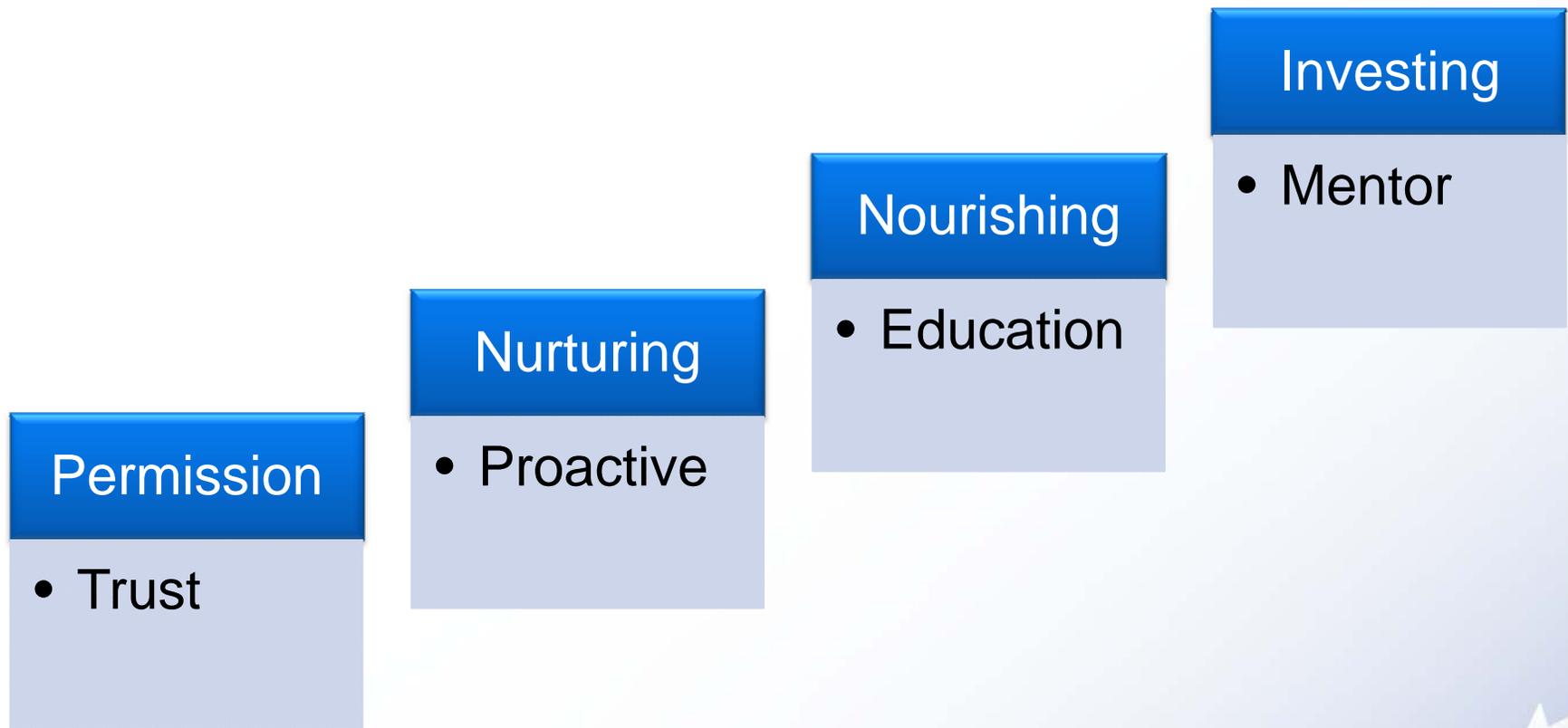
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The Climb to Trusted Advisor

- Permission
 - Building trust
- Nurturing
 - Proactive
- Nourishing
 - Education
- Investing
 - Mentor

Most firms stop here and are baffled as to why the client is resistant to an expanded relationship.

The Climb to Trusted Advisor



Doing things differently in Iowa.

- Honkamp Krueger & Co. PC
- \$31.48M (up 13.93%)

“The more meetings we have with clients the more business we get. We held client meetings in the past, but we formalized them more last year. We added more accountability in the system and it seemed to work.”

Accounting Today May 2011

Firm in Kalamazoo

- How do you grow your people and grow your firm at the same time?
- Focus on growing your team's business acumen.

Spokane, Washington

- Firm invest 4 hours for a Discovery/Planning session with A/B clients.
- 95% of sessions yield \$10K or more in new services sold

The Just One Approach

- A firm decided to focus all their marketing efforts into “just one” activity.
- Stopped schmoozing bankers, attorneys, etc.
- Invested time into A/B clients – met three times a year
- Grew 40% in one year

Your firm

- It costs 6-7 times more than re soliciting an existing client