

# THE 3 STEP MODEL TO SELLING ACCOUNTANCY

*'An article for Accountants – 'Wind up a Ferret and see where he goes'.*

UNDERSTAND



EVALUATE



HELP



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Peter Rosenwald is one of the UK's leading experts in Lead Generation for Accountants. If you would like to learn more about how we can help you generate new business then do get in touch.



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## UNDERSTAND

If you truly go into the required detail demonstrated in this article then you will vastly improve your levels of new business acquisition.

**UNDERSTAND** your services, the outcomes they create, the value they can deliver, what situation clients need to be in to gain value from them, both personally and for the businesses / department.

It is ragingly apparent that those Accountants who understand the most, always sell more. They're called experts and the cream rises to the top. However it is also clear that there is thicker double cream where the professional knows the differentiators that their practice as a whole can offer and what that means to people. Then there's the gold top sales legend where they have a good grasp of the first two plus an understanding of their partners' services as well. The essential element within these three levels is not so much the details of your service BUT IMPORTANTLY what outcomes your services produce and what situation people need to be in to gain value from them.

## EVALUATE

## HELP

When we say 'understand' you must be able to answer the questions; What outputs do your services produce? What value do these outputs deliver? What situation must people/businesses be in for these value adds to be worth considering?

For example a feature of tight management accounts is to allow a business to take advantage of supplier early payment discounts. The output is the ability to reduce costs, the value can be measured in £s. Therefore to sell this value of management accounts an understanding of both your service and your clients' current or potential supplier agreements is required along with an understanding of whether this output would be of value.

To learn more about this part of the process there is a model 'The Architect of Needs' which many Accountants find hugely useful.

### *The Architect of Needs*

Service	Advantage	Situation	Question
Name of the service	All the benefits that anyone in any situation could gain from the service	What situation someone would need to be in for the advantage to be of value	A question, or a list of questions to uncover whether any of the situations exists



'Understanding' then needs to cross into your appreciation of the client or prospective client. Understand both the individuals and the business. Their goals and priorities. What would look good and why? Their current situation and the past that prejudices their decisions. Their decision making structure & hierarchy. How they like to buy, pricing policies, purchasing departments, budgets and the differing opinions of stakeholders.

Understanding your clients and prospects is about being inquisitive. Inquisitiveness is determined by both the art and desire to be great at questioning, the techniques of getting people to truly open up and tell you what they need and want. The 'Who?, What?, Why?, When? and How?' of past, present and future.

Once you have understood you must then evaluate, consider and think. Whatever you call it you need to come to a decision as to the best way your services can be engineered to help. You have to come off the fence and offer a couple of alternatives.

**EVALUATE** how you engineer your services to help achieve the desired outcomes of both the individuals and the business. Consider their past, current situation and desired future. You should do this with your clients and back at the ranch. You need to think, discuss and test the water. Conceptualising with prospects engages them, draws them into the process and makes it legitimate. As an Accountant recently said to a farmer 'Can we just wind up a Ferret and see where he goes?'. It used to be called 'brain storming' became 'thinking outside the box' turned into 'blue sky thinking' and is currently a 'thought shower'. You might think I'm belittling it, far from it. Not enough professionals sit back and truly consider how to engineer services and their practice to get the best outcomes for the client. Talk to partners / seniors, considering the likes of; exactly how outcomes are going to be achieved & demonstrated. What the pricing policy will be; fixed, hourly or contingency, where you stand against the competition, how the stakeholders want to buy and how you will accommodate their various needs and preconceptions.

Accountants have been ‘productising’ their services and have stopped thinking about engineering their answers to people. The output is often a proposal written as a statement of services and prices rather than a solution with options. And a solution with options demonstrating the outcomes is what you should be offering.

Once you have evaluated you must help them to buy (get them over the line) and then help them implement.

HELP them to buy by pitching your services in a manner that makes buying simple for them. It’s not easy, there may be a range of decision makers to satisfy. Some may want a demonstration, others a written proposal and a chat over a pint or game of golf. How well you close a deal is a crucial part of helping people. Procrastination and risk adversity holds businesses back. It is undoubtedly your role to help them over the line.

Helping them move beyond the line to implementation must be within your gift when selling. You have not helped them until they have implemented your plan and gained the benefits. Your project management is crucial to helping them. There’s an important point here in that in initial meetings, Accountants have become good at conceptualising and discussing a new future. My issue with implementation is that these new futures discussed seem to get watered down to business as usual and a service provision, audit, management accounts, tax etc. The main, initial reasons / drivers for buying the service gets forgotten. Subsequently, however good the service is, the client is left feeling ‘lukewarm’ rather than ecstatic.

## ABOUT CHARTERED DEVELOPMENTS

Chartered Developments is recognised as the business development via lead generation authority among the professional services within the UK. With a reputation of being highly consultative, Chartered Developments deliver high quality and timely qualified leads.

The majority of lead generation activities take place on the ‘telephone and are followed up by email, building relationships and booking appointments on behalf of clients.

Chartered Developments also support their clients’ business development objectives by;

- Managing the firms’ social media networking (for example, LinkedIn),
- Nurturing relationships
- Providing sales training to help close business from the leads generated.

With an enviable portfolio of clients ranging from accountants, law firms, insolvency practitioners, actuaries, pensions consultants, banks and global business consultancies, Chartered Developments are trusted by firms large and small to provide superior leads and professional, peer-to-peer introductions.

By continuing to focus on core activities and only hiring experts, Chartered Developments are often seen as outsourced marketing and business development departments of firms; a position that the company feels honoured to hold.

To learn more about us and our services please visit [www.Chartdev.co.uk](http://www.Chartdev.co.uk)

If you would like to know more about how Chartered Developments could help your business then please contact Peter Rosenwald today.



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