

The Art of Closing & Keeping Clients Program Outline:

Goals and Objectives:

This program is uniquely tailored for accountants who wish to dramatically increase their selling and closing skills while attempting to acquire new clients for their practices. You will learn how to effectively close new business clients using our approach of Appointment Profile and Closing Strategies.

1) Introduction:

- a. Goals for the Program
- b. Some Pointers
- c. Unique Concepts – topics build upon one another
- d. Common reasons accounts don't close
- e. Bottom Line Selling - What client wants to hear, not what you want to say
- f. 2 step close - 80%/20% Rule

2. Understanding the True Value of your services:

- a. What is "true value?" and why is it vital for you to buy in
- b. Keys to Success – What clients want from us
- c. SYMITTOOF -explanation
- d. Train Wreck Mindset
- e. Quantifying Savings - tax savings to new prospects
- f. Tax Planning System
- g. Alternative to SYMITTOOF:
 - i. Consulting practice
 - ii. Outsourced Controllershship
- h. Take Away from this section

3. Selling Fundamentals:

- a. Poor Representation Mindset
- b. DPOAK
 - i. Decision Maker
 - ii. Pitch
 - iii. Overcome Objections
 - iv. Appointment Setting
 - v. 3 key Qualifications - see if prospect is worth pursuing

4. Using the Appointment Profile

- a. 3 Key ingredients to close
- b. DSQ
- c. Critical steps to the Appointment Profile
- d. Example

5. Re-Enforcement Videos

- a. Video #1 - Appointment Profile Refresher
 - b. Video #2 - C Corp Prospect
 - c. Video #3 - Sole Proprietor Prospect
 - d. Video #4 - S Corp Prospect
 - e. Video #5 - Entity Selection for prospect going into business
6. Closing Strategies:
- a. Action Close
 - b. Assumptive Close
 - c. SYMITTOOF
 - d. Chipping-In Close
 - e. Puppy Dog Close
 - f. F-U-D Close
 - g. Discount Close
 - h. I'm Better Close
 - i. Silent Close
 - j. Remote Close
 - k. 1040 close
 - l. Email Prospect
 - m. PUP
7. Accounting & Tax Agreement
- a. Example
 - b. Improving cash flow
 - c. Order of closing steps
8. In- Person Closing
- a. Role play example
9. Summary
- a. Conclusion
 - i. Rules to follow
 - ii. True Value buy in
 - iii. Bottom line selling
 - iv. Next steps to follow

You will receive:

Regular Binder

Closing Binder

Log-In Information to view the program Online
