

## **Why CPAs Should Acquire a Systematic Approach to Selling** *Improving Your New Client Acquisition Process*

*By Hugh Duffy, Build Your Firm*

When firms adopt a systematic approach to marketing and selling, the results are far more effective than if using a fly-by-the-seat-of-your-pants-approach. The logic is simple: A systematic approach is far more predictable and consistent in delivering the results desired.

### **Systematic Approaches Are Used Everyday**

Consider leading athletes. The best athletes use a systematic approach to deliver consistent, superior results. In basketball, the systematic approach used by Steve Nash, Dirk Novitski, and J.J. Redick for free throw shooting is far more effective than the approach used by Shaquille O'Neil and Ben Wallace. In golf, Tiger Woods and Phil Mickelson use a systematic approach for every shot—and just look at what they've accomplished!

Whether it's a system for processing payroll or interviewing for a job, there has to be a process in place to improve the end result and offer the best possible outcome. Think about it. Would you process multiple client payrolls using an off-the-cuff *non-standardized* process? Would you go into an executive interview with the company's president and just wing it? Of course not...

With this in mind, why would you go about marketing and selling services without having a system in place? Building your firm without a structured, well-designed system is like driving a car with your eyes closed.

### **Identify the Most Effective Sales System**

The first step is to define what is meant by a *system*. A system is simply a series of steps designed to achieve a specific result. It contains a set of principles, processes, strategies, and approaches to deliver consistent, positive results on a daily basis. The second step is to identify systems that are critical to a firm's growth strategy.

Because the world is constantly changing, it's important to update the sales system to stay current with today's marketplace. The popularity of the Web and e-based communications nullifies the use of dusty, out-dated sales systems and requires firms to re-evaluate how they communicate and interact with prospects and existing clients. For firms serious about growing business, the following are imperative for success:

1. A System for Lead Generation
2. A System for Converting Prospects
3. A System for Selling More to Existing Clients

The best way to identify and develop an appropriate sales system is to learn from others who have extensive experience with marketing and selling and have tested the effectiveness of their systems. The best advice is to seek out these firms, ask questions, and observe how they operate. From there, you can begin to build your own advanced selling system. And once you do, you will be amazed at how much easier it is to consistently grow your business.

### **About the Author**

Hugh Duffy is co-founder and Chief Marketing Officer for Build Your Firm—a leading practice development firm dedicated to the accounting industry. Build Your Firm works with small accounting firms providing accounting marketing, practice management, and CPA website

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