



BA softTRAINING

Communications and Sales

Sourcing new work from existing and potential clients

Many accounting firms complain that they do not have either the time or the internal capability to proactively obtain new work from current and potential clients. The key issues are usually that there is no clear plan in place and staff have not been trained in how to 'sell' the firm's services. This workshop is designed to challenge current attitudes relating to 'selling' and to give staff the basic skills to be able to identify opportunities for new work !

Objective To provide specific 'sales' training to the accounting and administrative team in identifying and addressing client needs in a number of predefined areas.

Prework Senior team members will be asked to identify a list of potential services and client groups that will be targeted.

Workshop The workshop will focus on interactive roleplays and group discussion. Business Aptitude will provide specific instruction and examples of role-playing. The team will break into groups of 3-4, take turns at being firm representative, client and observer, then back into main group for feedback from each group + general discussion.

We will consider the following issues :

- What questions do we ask clients ? (filtering)
- What 'objections' are clients going to bring up ?
- How are we going to address those 'objections' ?



Business Aptitude will provide a workbook incorporating basic scripts, checklists and general procedures for capturing potential leads.

This workshop has been conducted successfully with firms from 5 to 30 people in size, incorporating both administrative and accounting teams. It is guaranteed to be challenging and relevant to the needs of accounting firms.

Timeframe 2.0 hours

Fee \$990 including GST
(may vary on the basis of specific requirements)

Who is Business Aptitude ?

Business Aptitude is a business development consultancy that specializes in providing professional firms with expert advice on operational, marketing and financial issues. Our unique approach is designed to help firms in practical ways to address the operational, marketing and financial issues that are essential for growth.

Visit our new specialist practice management website at www.practiceaptitude.com.au.