



# TAX SEASON CONVERSATION BATTLECARD

The top reason business clients report for switching accountants is that their firm did not check on their changing needs.

## PRE-MEETING

Make sure your clients know you care. Before the meeting, let them know you want to check in on their business and talk beyond tax.

### BACKGROUND CHECK:

If they are an existing client what business issues do their past returns indicate? If they are a new client, use your experience of their industry or research common issues.

### “SERVE, DON’T SELL”

Work out how you can help your clients succeed, not just how they can pay you more.

### WHY HAVE YOUR CLIENTS NOT TAKEN ADVANTAGE OF YOUR OTHER SERVICES BEFORE?

#### Do they not know about them?

Don't just list your services and hope they will pick something. Research their possible issues, and what you could do to help.

#### Do they not care about them?

Use your expertise to look for issues they may not be aware of. This could be done before the meeting, or during the next part: Discovery.

**70%**

70% of accounting clients were not aware of all the services their firm offered

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**3**

Ask them to think about their 3 biggest concerns about their business.

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**80%**

80% said they wished their firm offered services that were actually already available from that firm.

## DISCOVERY

Not all clients know what they want, or what they need. Discovery just means asking questions to find out how you can help, not how they can pay you more.

This is as much for the clients to understand what’s causing them trouble as it is for you.

## WHAT IS THE CLIENT LOOKING TO ACHIEVE?

You need to understand their ambitions for their business, and also for their life outside work. Remember, inefficiency eats up hours that could be spent out of the office. For some people that is far more important.



### GROWTH

**How do you feel about the growth of your business?**

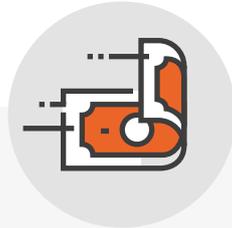
Is growth meeting your expectations?

At the start of this year, what growth rate did you want to achieve?

Did you reach it? (If not) Why do you think that is?

What are your overall growth goals for the company?

What are some key strategies to achieve those goals?



### SALES AND PROFITS

**What challenges are you facing in increasing sales?**

How are you addressing them?

How do you feel about your profits?  
.....

**Were profits what you projected for the year?**

If you fell short, why is that?  
.....

**What will you do differently to improve profitability?**



### VISION, STRATEGY, OPERATIONS

**Do you have a clear sense of where you're headed as a company?**

Has it been communicated throughout the company?

Is there a strategy to achieve that vision?

Is it documented and shared?

Do key firm leaders understand their roles to implement that strategy?

How do you measure how well it's working?  
.....

**Is the company operating as efficiently as it might be?**

If not, why?

## THE PITCH

Even though this is a sales term, it just means saying how you can help. By now you should know what matters to them –explain how you can make that better.

### 1 EXPRESS YOUR CONCERN AND CONFIRM WITH THE CLIENT THE SIGNIFICANCE OF THE ISSUE

### 2 DISCUSS NEXT STEPS FOR HOW YOU CAN HELP.

- A. If it is a large issue, set an exploratory meeting, consulting session, etc.
  - i. Schedule the meeting on the spot
  - ii. Remind them, it's just an exploratory meeting. No charge.
- B. If you can start sorting it now, set an agreement.

Even if your client is used to how things are, you could still make improvements.

Opportunity cost is the value they are losing by sticking with the status quo.

## AGREEMENTS

**Setting Service Level Agreements is key to making sure what is agreed in the meeting happens in practice.**

Agree what will be provided, by both you and your client.

Charge penalties or a premium for any breaches of the client agreement e.g. if the client doesn't update their books when they say they would or their accounts are in a worse state than they said.

Otherwise, extra services just become another unprofitable burden for you.



Find out more about how receipt bank can make your tax season effortless

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