

Professional Selling for Accountants | Learning Objectives and Assessment tasks

Learning Objectives:

1. Understand the key principles of relationship selling for professionals
2. Implement a step by step process to move a client from interest to commitment
3. Explore some of the challenges in getting prospects and clients across the line

No	Module	Key topics	Assessment tasks
1	Understanding client needs and wants	<ol style="list-style-type: none"> 1. What do clients really want? 2. The advisory services roadmap 3. The discovery conversation 4. Client health checks 5. Active listening techniques 	<ol style="list-style-type: none"> 1. With reference to the supporting workbook on Discovery Conversations, develop your own agenda for a discovery meeting. Include a checklist of 10 core questions that you would like to ask your clients. Share this with your colleagues. 2. Does your firm have a client health check? If so, review and discuss how it can be used more effectively to uncover client needs. If not, then develop your own healthcheck using this presentation and the support materials as a guide. 3. Identify up to 10 clients who you would like to engage in a discovery meeting. Set a timeframe and develop a procedure to invite them to these meetings. Ideally, a discovery meeting should be run independently of a tax and accounting meeting. 4. Develop at least 3 firm and/or individual SMART actions from this module. Ensure that the actions are specific in nature and have a clear timeframe for completion. Where possible, keep the timeframe within 3 months.
2	The continuum of pricing options for advisory firms	<ol style="list-style-type: none"> 1. Review –a journey of discovery 2. Client behavioural and motivational styles 3. RAIN - From discovery to commitment 4. Succeed with proposals 5. Dealing with client roadblocks 	<ol style="list-style-type: none"> 1. Develop your proposal template using slide 19 as a starting point. Consider (a) key pages to include (b) how the proposal will be presented to the prospect / client and (c) the outcomes you expect from the proposal.

			<ol style="list-style-type: none"> 2. Develop a 3 option proposal that incorporates (a) essential services (b) essential services + quarterly meetings and (c) comprehensive advisory service. Consider how you will present and price these services as options for the prospect / client to consider. 3. Consider up to 3 instances where proposals you made to prospects or clients were not accepted. What were the stated reasons for not proceeding? Think more deeply, what could you have done to influence the outcome in a positive way? 4. Develop at least 3 firm and/or individual SMART actions from this module. Consolidate these actions with the actions you developed in module 1. Review these actions on a weekly basis. Create external accountability if possible..
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