

**ABG** **EuraAuditInternational**  
ASSOCIATION OF INDEPENDENT FIRMS

**Generating new leads and  
converting new clients**




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**ABG** **A bit about me..**

Qualified Chartered Certified Accountant in 1985  
Partner at ABG since June 1989

Portfolio of medium-sized, owner-managed businesses and  
high net worth individuals.

Forte in proactively helping clients with tax planning, tax  
mitigation and wealth protection.

Head of Business Development at Arram Berlyn Gardner

Lifelong Tottenham Hotspur fan



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**ABG** **Show of hands**

**How many in the room would like to get new clients,  
expand their businesses, become more profitable and  
add to the value of their firms?**




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### Show of hands

How many of us in the room today actively engage in regular marketing and business development activities?



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### People buy people...

- We all know that... it's no secret...
  - Have front of house people and back of house people
    - Your best audit partner might not be the best at selling so don't ask them to do it!
  - Only front of house people should be involved in business development
    - Look for good soft skills and people skills – not necessarily specialists in a field
  - You will get it right by getting it wrong!!!
  - Become a specialist in having lunch/breakfast/dinner

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### Find the right types of new clients...

- Profile your best clients and look for similar businesses
- Have reciprocal arrangements with other firms for those that contact you that are inappropriate/too large/too small
- Always have a first meeting at your office and offer it for free
- Remember listen first - you have 2 ears – 1 mouth!



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### Your referrers will include...

- Bankers
- Solicitors/lawyers
- Financial advisers/wealth managers

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### Other sources

- Invite prospects to seminars & networking events (football, cricket, tennis, fishing, shooting - try to include their spouse!)
- Use your website to improve your Google ranking and reach a wider audience

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### What is really important???

- New prospects need to be matched with the right partner within the firm
- Find out why they want to change accountants
  - Remember if they don't want to pay their existing accountant, they probably won't want to pay you!
  - Act quickly to enquiries and referrals
- Remember to ask them what is most important to them!
  - It is all about them, not you!
  - Be interested and listen, they are probably telling you what their existing adviser has failed to hear!

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### Referrers

- Pick your referrers carefully
  - Quality over quantity
- Have a list of favourites and meet regularly with them

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### Client referrals

- Remember to ask existing clients for referrals
  - It's obvious I know but you will be surprised how many accountants don't like to ask

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### Few additional tips...

- Have an agenda for meetings with clients and prospects
  - Share file notes after the meeting
- How can you really help them - make it clear in writing if necessary
- On-boarding can be expensive. Consider how much work you will need to do for free before you start to charge

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### Few additional tips...

- The little things really matter. Remember their birthdays, wedding anniversaries, due dates of babies etc (use your CRM system to help) (**Beware of GDPR**)
- Send referrers of new work a small gift of appreciation when you convert the client. Preferably with a personal thank you note. This is always well received (bottle of champagne, wine etc)

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### Build up your profile

- Arrange to talk at events, you are the industry expert!
- Offer to talk at external events arranged by your referral network of bankers, IFA's as well as those arranged by clients and contacts . Gain access to their clients and contacts!

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### Seminars

Some of the seminars we have run this year




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**ABG** **You are the expert**

- You are the expert
- You are your client's most trusted advisor
- Write content for newsletters, white papers, reports and blog posts

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**ABG** **Publications**

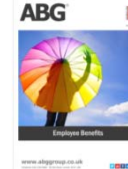
A few examples




Personal Tax Planning



Investing in small companies



Employee Benefits



Firms P11D - All Change!

www.abggroup.co.uk

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**ABG** **Show of hands**

**How many of us have a central database that manages our clients, contacts and prospects?**




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### Cross selling

- Look at your client records to identify opportunities to cross sell additional services
  - You may only currently provide 1 service - could you offer them additional services (investment advice, pensions, payroll, bookkeeping, audit services)?
  - Can you create opportunities by providing business planning advice (preparing their business for sale or preparing for their retirement)

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### Niching (are you different)

What makes you different to your nearest competitor?

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This is how this firm are different!

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### Are you different?

- Other things you can consider to differentiate your firm
  - Your commitment to green and ethical issues
  - Your commitment to charitable giving
  - Client service guarantees
  - Sectorisation (separate your services to industry sectors)
  - Specialisms

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