



Accountants/Bookkeepers

Market Includes

- Accounting and Bookkeeping Services S.I.C 8931
- CPAs—Public Practice S.I.C. 8932
- CPAs—Government S.I.C. 8933
- CPAs—Education S.I.C. 8934
- Public Accountants (PA) S.I.C 8936
- Misc. Professional Accounting Services S.I.C. 8990

Market Image

- Image and credibility are critical
- Stability and long-term relationships
- Consistency and reliability for all services—both large and small
- Referrals and affiliations are important

Business Considerations

- Great sell-through referral source and sell-to customer
- Some offer software products, training and consulting
- Competition for customers among accountants
- Will advertise and market themselves and the firm
- Multiple records to manage

Departments

- Partners
- Associates/Intern Services
- Office Manager
- Billing/Finance
- Marketing (Marketing Specialist—in larger firms)

Tips for Managing the Account

- Uses technology to communicate with government entities, businesses and clients
- Averages 1 to 50 employees
- Typically automates payroll
- Appreciates the convenience of a single-source approach
- Trust and credibility are essential for growing the relationship
- Create business collaborations by offering your services to PR events
- Custom solutions are important so they stand out, e.g., forms, checks, business stationery, greeting cards, promotional products, capabilities brochures, etc.
- Share ideas for organizing records and ordering cycles
- Manage and support their referrals

Larger Firms:

- May have a dedicated marketing resource

- Educate the marketing specialist about the broad array of solutions
- Discuss fee income (disclosure issue)

How This Market Grows

- Personal touch is important to growth
- More individual than commercial customers
- Partnerships can signify additional areas of focus, e.g., taxes, general business management
- Tend to use simple, very direct marketing messages in their advertising
- Personal assistance/solutions is a growing service offering
- Expand service offerings

Peak Buying Periods

- Personal tax season
- Business tax season—can vary based upon the business structure
- Depending upon services offered, first month of each quarter is spent wrapping up business for existing clients

Probing Questions

- Do you specialize?
- Can you describe the types of services you provide?
- Have there been changes in the firm in the last year?
- How many offices do you currently have?
- How do you promote your services?
- How do you follow up to ensure client satisfaction?
- Do you have plans to expand your services, add locations or affiliations?
- How often do you meet with your clients?
- What marketing activities do you currently use? Which ones do you find most effective?
- Do you do any seasonal marketing, e.g., tax season, etc.?
- Do you participate in any local events? If so, what types of events do you find most effective?
- How do you attract new clients?
- How do you inform existing clients of new services?
- What software applications and versions do you use?
- Are these software applications for both internal and client use?
- Do you process payroll for clients?
- Do you order checks and tax forms for your clients?
- Do you present your larger clients with an annual thank you or holiday gift? If so, what have you found to be most effective?
- Do you include suppliers or other businesses/affiliations in your staff meetings?



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Sales Approach

- Contact: You may work with the business owner or office manager depending upon the size of the firm
- Be flexible—offer options
- Present yourself as a professional solutions provider
- Complete your research and be knowledgeable about the image they strive to portray, affiliations, outreach/educational/informational programs they provide, etc.
- Be prepared to discuss details, e.g., dates, quantities, options, etc.
- Understand the scope of services they offer—this is important to meeting their needs

- Great referral source—see what opportunities you can bring to the table
- Understand their service offerings, appointments should be set without interfering with peak periods

Larger Firms:

- Start your relationship with the office manager if you don't know the owner
- Meet with the marketing specialist—we can help you with everything

Product Solutions

General Offering:

- Stationery, e.g., Letterhead, Envelopes, Business Cards, etc.
- Presentation Folders/Proposals
- Annual Reports/Financial Reports
- Appointment Cards and Appointment Books
- General Forms
- Booklet/Catalog Envelopes

Tax Services:

- Tax Guides
- Tax Forms (W-2s/1099s, etc.)

Business Management Offering:

- Filing Products (Cabinets, Folders, Labels)
- Checks and Business Forms
- Statements
- Window and Imprinted Envelopes
- Petty Cash
- Receipts/Receipt Books
- Deposit Slips
- Endorsement and Misc. Stamps
- Toner Cartridges—Standard and MCR

Marketing and Full Color:

- Holiday Cards and Calendars
- Reminder Postcards (tax season)
- Capabilities and Tips Brochures
- Educational materials

Services:

- Check Fraud Protection—EZShield®
- eChecks
- Design Services
- Mailing Services—both saturated EDDM and targeted mailings to existing customers
- Multilingual
- Rush Services
- Multiple Location Delivery

Promotional Items:

- Pens and Pencils
- Mugs
- Flash Drives
- Calculators
- Stress Relievers

Larger Firms:

- Annual Gifts (be creative)