



How to sell accountancy services virtually

So you've made it through a global pandemic in crisis mode, and you've worked out how to survive. But what changes do you need to make to your existing selling process in order to now thrive. Selling can be a daunting task to many, even without the additional challenges of remote working, 2m spacing and a fractured economy. So, what are the key tools your firm should have in its arsenal to make the virtual selling process as pain-free, and fruitful, as possible.

Sharpen up your website

So now your website is getting more visits, let's think about what it says about you. If the last time you added to or updated your website was over 6 months ago, it's time for a refresh. If you've used a web designer in the past, get back in touch and send them some sites that you'd like to take inspiration from. You could also consider outsourcing your content to keep your blog and newsletter

fresh with a service like Bizink. Your website is your shopfront, so investing properly is undoubtedly going to help with conversion. However, if you're tightening the purse strings, you can build and host your own website for as little as £15 per month with **Squarespace**. Squarespace is a drag and drop, DIY website builder with design-led templates that give a professional finish, even in the hands of a tech-novice.

Standardise your services

Now that your google ads and website have captured your lead's attention, it's time to introduce your service offering. In a world where instant gratification rules, and you can binge-watch a whole series in a night or receive an item from Amazon in less than 24 hours, it's essential that you make your services as quick and easy to understand - and sign up to - as possible. Consider including a 'Services' or 'Packages' tab of your website that gives a clear overview of exactly what each of your services involve. To make sure that you're capturing your leads' enquiries, **Practice Ignition's** web connector collects their key details, the services they're interested in and automatically converts these into a slick proposal and engagement letter customised to their requirements. Practice Ignition then notifies you of the lead's enquiry, which may prompt you to organise a client meeting via **Zoom** or **Teams**. By standardising your services, you can go into this meeting in the knowledge that your lead knows exactly what they can expect from you and isn't going to waste your time with unrealistic expectations or requests. You can also be sure if they've arrived in your pipeline via the Practice Ignition web connector that they are very serious about working with you, so you can focus on sharing your expertise and plans for the potential client, rather than buttering them up with your best sales pitch. Standardised services also mean that any member of the team can have this sales conversation with a potential client, increasing your firm's selling engine and opportunities.

Be transparent about pricing

For many people, the most painful part of the selling process is telling the client what their services are worth. Some firms will deal with this head on by publishing



their prices on their website, meaning that they'll spend far less time haggling in client meetings, as price-sensitive clients will have already turned away already. However, even if you're not keen on presenting your prices online, it's essential to have transparent and standardised pricing that you can present in the client meeting. It can be difficult to have the confidence to tell a client what you're worth, so why not use a tool that calculates each bundle of services with a clear breakdown to show how you've arrived at the final price. **Practice Ignition's** Web Connector is the perfect way to show the

client exactly what they are getting for their fee. You'll reduce the time spent haggling and you'll find that clients will respond well to a transparent, off-the-shelf pricing model, as they'll feel confident that your pricing is fair across your client-base. If your client does enter bartering mode, stay firm, have confidence in what you can do for their business, and maybe keep some case-study facts to hand to persuade them of the value of your services.

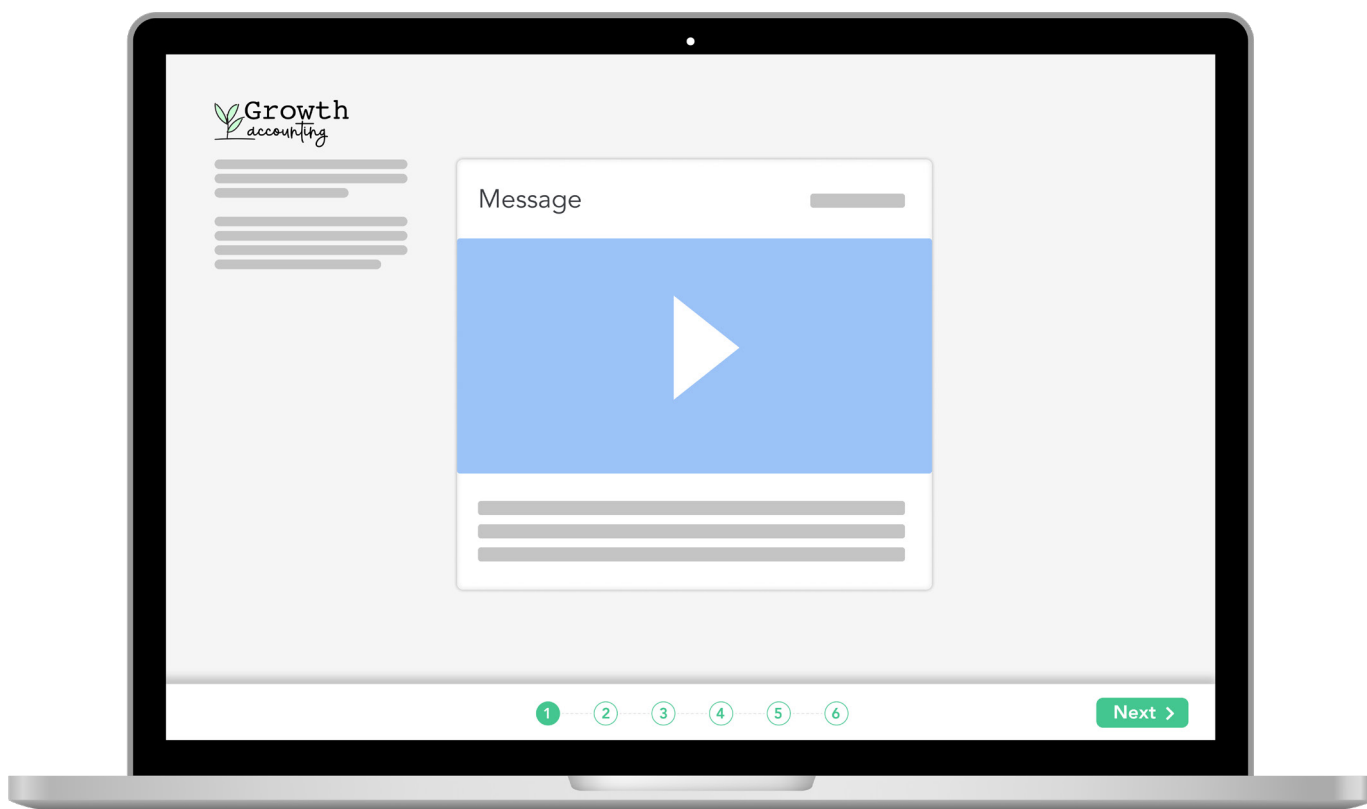
Formalise the deal quickly

Your lead has now agreed to work with you, so it's essential that you act fast and formalise this agreement as quickly as possible. If you're using a manual tool like **Microsoft Word**, consider upgrading to a platform like **Practice Ignition** that allows you to send out beautiful proposals and automatically customised engagement letters in under 5

minutes. If you're still printing engagement letters, it's essential to make this process digital, both from a time-saving and client experience perspective. The longer you take to issue out the agreement, the longer the lead has to cool off and reconsider their decision. Moreover, you've just told the potential client that you are excited to work with them and transform their business using all of the best technology available. So, to lose this momentum with an outdated signup process could risk the first opportunity to build trust with your new client.

Let your clients do the selling for you

Accountants and bookkeepers play a hugely sensitive role in a business's health and growth, so lots of business owners feel more confident picking their accountant based on trust. Before Covid-19, your clients will



have had far more networking opportunities and will have come into contact with many more of their contacts each month. However, with reduced business and social events in everyone's calendars, opportunities for word of mouth recommendations will have seen a decline. So, let's change the way you're receiving these inbound leads. Why not incentivise referrals by telling your clients about your referral scheme. Offering a small discount on the next month's invoice or offering an existing client a free advisory session for every new signup they refer to you is a brilliant way to get your clients to do the selling for you. A tool like **Mailchimp** is great for sending comms to your whole client base. **Practice Ignition's** confirmation email and pop up window to new clients are also fantastic ways to automatically let every new client know about the scheme.

Embrace reviews

Do you get lots of fantastic feedback from clients but feel like you have very little proof of their positive experience with you? Well, the stats are in, and 95% of online shoppers will read a review before making their purchase. In a 'new normal' where it's only possible to buy online, it's therefore essential to make your reviews centre stage. For a quick fix, it's a great idea to send out a survey using a tool like **Typeform**, and cherry picking the best quotes to put on your website. But, if you want to turn your credibility up a notch, **Trustpilot** is a fantastic tool to collect your customers' feedback and gain potential clients' trust by viewing honest reviews on such a reputable platform. **Trustpilot** can also plug into your website to automatically show off your 5* ratings as soon as they've been submitted.

Buy yourself the time to spend on Sales and Marketing

One of the biggest barriers to business development is often from a resource perspective. Some firms may not have the budget to employ a salesperson, and your team might not have enough hours in the day to create marketing content alongside looking after their existing client base. Or, you may have read this article and thought 'sounds great, but I don't have the time to implement these ideas.' It's all too easy to waste hours and hours each week on internal admin processes like editing engagement letters, adding new clients to the general ledger, creating invoices, chasing late payments, checking the status of a piece of work via email and issuing Anti Money Laundering forms. The list really could go on. By investing in tools that automate these tasks, you'll free up hours and hours of time each month that could be spent on any of the tricks identified in this article. Take a look at **Xero Practice Manager** if you need a task and workflow tool, check out **Bizink** for Anti Money Laundering automation and book a demo with **Practice Ignition** to see how you can automate your engagement letters, payments, invoices and new client onboarding process.

Simply send out an initial email to all your ITR clients followed up shortly after by a Practice Ignition proposal with your ITR service added and payments enabled to collect an upfront deposit.

We even have email templates available (see below) so you don't have to lift a finger!



91%

of our customers spend less time
creating proposals and chasing
signatures and payments

87%

were able to cancel other
software subscriptions

80%

have fewer (or no) unpaid
invoices at any given time

**And the majority of Practice Ignition
customers are closing more and bigger deals...**

To find out more

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