

How to keep booking clients

You have confidence in what you do, but it can be difficult to transmit that same confidence to your prospective clients. As a result, new leads are slipping through your fingers more often than you'd like, and your business is missing out on new revenue.

Want to learn how to get new clients?

Check out these 10 expert sales tips to find new leads and sell your services more effectively:

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1. Work harder for referrals

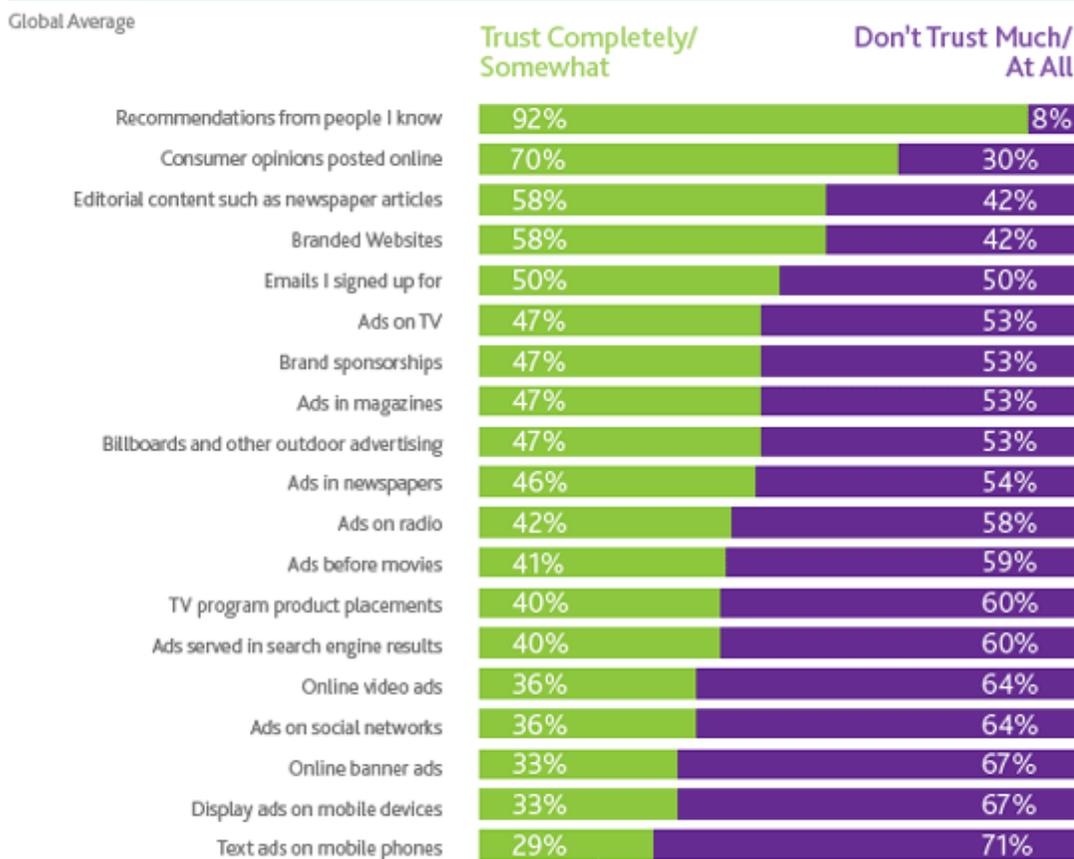
Word of mouth is a powerful tool for any business, and especially for a trust-based business like accounting.

After all, your clients are entrusting you with their hard-earned money. So, it's only natural that they want to be sure they trust you before making a decision.

What's one way to gain their trust?

According to a study by Nielsen, 92% of customers around the world say they trust recommendations from friends and family above all other forms of advertising.

To what extent do you trust the following forms of advertising?



Source: Nielsen Global Trust in Advertising Survey, Q3 2011

Photo credit: Nielsen

The point: you need to work harder for [customer referrals](#). You can invest in all kinds of customer acquisition strategies, from online advertising, to engaging on social in relevant communities, or even [cold calling](#), but the best converting leads will always be customer referrals.

To do this, include a referral ask into your [sales process](#). The best time to ask is right after a purchase has been made.

[Even if the customer says no at first](#), ask them one more time to think of just one person who would benefit from your accounting services. As uncomfortable as it might feel the first time around, this method works: We've found that almost half of customers will come back with a name after the second ask.

Then, to make things simpler, offer to send them a referral intro template that they can just copy and paste into their email and send to the referral. It could look something like this:

Hey [first name],

I wanted to connect you with Steli, their company does XYZ. I think this can be really interesting for you, and a contact would be mutually beneficial.

I'll let you guys take it from here,

[Your name]

By adding this step to your accounting sales process, you'll be sure to add new clients to your business that are better qualified and trust you more from the get-go.

2. Get bookkeeping clients by being a trusted advisor

Let's face it: Most people hire an accountant because they can't figure out their bookkeeping or taxes alone, or they just don't have the patience to do it themselves.

But, if they're going to trust you with the weighty responsibility of handling their finances, they need to trust you. If you don't have a direct referral, how can you gain that trust?

A study by [Accounting Today](#) asked small businesses what they look for in an accountant. 78% of small businesses responded that it's very important that their accountant can act as a trusted advisor. They ranked this as more important than being affordable or responsive.



In other words, you earn trust by proving your worth as an advisor for their company, not just as an accountant.

Here's how this works in practice: Start by understanding your prospects' accounting needs. What do they currently understand about their finances? What do they need help with?

During your conversations with them (even before they make a purchase decision), allow them to ask you questions. Help them get clear answers by explaining the situation or requirements without the accounting jargon you might use with fellow CPAs. When you take the time to explain tax or accounting topics to your prospects, they'll see you as an expert. But when you can successfully advise them on how to handle certain situations or problems, they'll view you as a trusted advisor and be more willing to purchase your services.

3. Share your expertise where your audience is looking

Being a trusted advisor can actually start before you even meet your new accounting leads.

Remember: Before your leads start looking for an accountant, they're probably looking for bookkeeping advice. Individuals or small businesses that are trying to limit expenses will likely try to handle their accounting on their own before they hire an accountant.

You need to be at the top of their mind when they realize they need help.

Here's how [CPA Michel Valbrun](#) explains it:

Oddly enough, I wrote a book called *Prolific Profit: How Successful Businesses Maximize Profits and Dominate the Market*, and when I spoke to a new client, I learned that they found out about me because I published a book. Whether you write a book, post regularly on social media, or host webinars on topics that are helpful to your audience, you're getting your name out there.

Giving away accounting advice for free may seem counterintuitive, but remember this: When people who read your book or attended your webinar realize they can't handle their finances alone, your name will already be on their minds.

4. Learn the art of cross-selling and upselling

Sometimes the best way to get new accounting leads is to take a look through your current or past customers.

Some people dismiss [upselling](#) or cross-selling as a sleazy sales tactic used by online stores to convince you to buy things you don't need (I'm looking at you, Amazon).

But remember: Your ultimate goal is to help your customers succeed. And they likely need more financial help than they might initially realize.

For example, a small business may come to you looking for help with filing taxes. But in your conversations with them, you may realize they're not planning well for normal expenses such as taxes, payroll, etc. Solving this problem is in the customer's best interest, so why not offer to help?

This is what CPA Michel Valbrun does:

Just like a doctor, we diagnose their situation and provide a tailored solution. In most cases, it results in either saving them \$10,000+ in taxes or helping them increase their profits from 10%-20%.

This approach of selling just like a doctor is very much in line with what we at Close have been advocating for.

By asking the right questions and getting to know your customers' real needs, you can give them not only what they're asking for, but also a solution that improves their business and helps them succeed.

5. Take advantage of online business listings and reviews

Never underestimate the power of online business listings, especially if your accounting firm is a local business for your area.

Make sure you stay up-to-date with listing sites such as Google My Business and Yelp, as these are the places where many people first discover businesses just like yours. The better you look on these listing sites, the more likely you'll be to get new bookkeeping leads.

For example, by updating your Google My Business profile, you help your accounting firm stay higher in the search results in Google. You can use this profile to show off your great customer reviews, explain key aspects of your business, and make your contact information readily available. You can even chat with prospective customers right inside your Google My Business page!

More than that, these are the perfect places to gather reviews for your business.

How does this help your business? Here are some stats:

- Review signals account for 15% of Google's local ranking factors ([Moz](#))
- Only 53% of people would even consider using a business with fewer than 4 stars ([BrightLocal](#))
- Bumping up your star rating by just 1.5 could mean an increase of up to 13,000 new leads for your business. ([Location3](#))

But to get these great reviews and ratings online, it will take work on your part. Just like you included a referral in your sales process, you should always ask your customers to give you a rating or review online.

When you complete the services you promised and they're satisfied with your work, send them something like this:

Hey X,

You're all set! Your taxes for this year are ready to be filed, and everything looks like it's in order.

We're so happy we could help you out, and we hope we've saved you from the major headache of filing taxes for your small business. If you have a second, we'd love it if you could add a review to our business listing here: [\[link\]](#)

Thanks!

By adding this ask to the process for each new happy customer, you'll be bound to increase your online reviews and improve your accounting firm's reputation online.

6. Partner with the right businesses

To get new accounting leads, having the right network is essential.

And a very lucrative part of your network is the businesses that run parallel to yours.

For example, if you handle tax accounting services, why not partner with a payroll service company? Or, if you offer wealth management services, it might be interesting to partner with an attorney who specializes in handling the legal aspects of wealth, such as wills. And if you specialize in taxes for freelancers, solopreneurs, or small business, consider partnering with [free accounting software providers](#).

To find the right partners, expand your network. Get to know other local businesses in the financial sphere. Also, talk to your clients and see what other businesses they're working with to complete related tasks.

When you get to know these businesses, you can set up valuable partnerships that are mutually beneficial to both.

7. Be more active in the event space

Another interesting place to find new accounting leads is at local (or virtual) events.

To figure out which [events you should be at](#), go back to your [ideal customer profile](#). If your ideal customers are all small businesses, for example, find out what local events geared towards small businesses are coming up.

When attending these events, the goal is not to sell yourself on the spot. In fact, one of the most effective [sales networking hacks](#) is to sell nothing at all.

Be a person that is interesting to talk to and aim to build a smaller number of valuable relationships rather than a high number of 'connections'.

This is another space where you can be a trusted advisor. When you share your expertise without asking for anything in return, it builds trust and convinces prospective clients without selling.

8. Keep your business in front of your market

If your business is top of mind for your prospective clients, they'll be more likely to turn to you when they realize they need help.

One way to stay in front of your market is through online ads.

Here's what accounting expert Michel Valbrun does:

My favorite way to get new accounting leads is through Facebook ads and webinars. Facebook ads save me a ton of time and are constantly putting my brand and service in the marketplace.

Of course, to make sure your ads are providing a decent ROI, you need to make sure you have clear, [specific customer profiles](#).

To start, take a look at your top customers and ask:

- *What do these accounting clients have in common?*
- *Are they all small businesses, freelancers, individuals, large businesses?*
- *Are they all in one common industry?*
- *Do they all have around the same number of employees?*
- *How did they find you originally?*
- *What solution are they looking for when they first contact you?*

Then, you'll be able to successfully target the right people who are in need of your services.

9. Overcome the fear of following up

Following up is probably one of the scariest aspects of sales, and most would agree that it's their least favorite part of business relationships.

Do you have a list of people who promised to call you back but never did? It's time to overcome your fears and [start following up](#).

Your follow-ups should follow these four rules for success:

- Be persistently friendly
- Keep it short
- Provide value
- Avoid inducing guilt

[Sending a follow-up email](#) that's friendly, concise, and doesn't make your prospect feel guilty is the perfect combination for success.

And following up more has given real results to other accounting firms. [CPA Suzanne Conrad](#) realized that 'bugging' people can actually work out to be mutually beneficial when she landed a four-figure contract with someone who was about to miss their IRS deadlines. In this case and many others, following up was the key both to providing real help to the client and to getting more revenue for the accounting firm.

But what if you don't have time to keep sending multiple emails to prospects? Then create personalized email sequences to send to unresponsive prospects.

[In Close](#), you can set up email sequences to follow up automatically with leads that have gone dark. It's simple, fast, and easy.

New Email Sequence

Cancel

Save

Email Sequence Name

Post Conference Follow Up

Step 1 • Day 1

Send immediately  

Post Conference - 1 - Schedule demo
SUBJECT: Remember me?

Remember me?

 Edit Template

Hey `{{contact.first_name}}`,

It was great to meet you at the Conference last week. When we met at the booth, you asked me to follow up to schedule a product demo.

Does 2PM tomorrow afternoon work for you?

+ Add Another Step

Sending Schedule

10. Time your follow-ups right

While following up is important, accounting firms have more specific windows when following up can get them a higher number of leads.

For example, accounting firms who handle tax returns might take advantage of tax seasons to send follow-ups and reminders to past clients or prospects who haven't taken the leap yet.

Also, you can time your follow-ups right by keeping tabs on your prospects. For example, if a small business in your list just added lots of new employees, you could reach out and offer to help with their new payroll needs.

By finding opportunities like this to follow-up at the moment when your prospects need you most, you'll be more likely to be top of mind when they're ready to reach out for help.