

***REPLACING  
- THE -  
RAINMAKER***

***WORKSHOPS***

***SOLUTIONS AND DEMONSTRATION***

This workbook accompanies the audio workshop. It includes speaker's notes, which summarize the content covered in the workshop. It also includes activities, which you'll complete during the workshop, and a continuing education assignment, which you'll complete after the workshop. The continuing education assignment gives you a chance to apply the theory you learned in a practical setting. At the end, there's a quiz to test what you've learned as well as space to make notes and information on where to go to learn more.

## ***SPEAKER'S NOTES***

### **Learning outcomes**

- You'll learn a few key tips for how to succeed when presenting solutions.
- You'll learn a step-by-step process for nailing your presentation.
- You'll learn about your options for offering proof that what you say is true.

### **Turn the spotlight**

- Draw on everything you learned during the needs assessment to present your solutions.
- Connect your capabilities with the prospective client's needs.
- If the prospective client isn't convinced, offer a demonstration event.

### **Make your case**

- The solutions stage of the sales process is a chance to pitch your services.
- You tell the client who you are and what you do best.
- If you succeed during the solutions stage, chances are you'll breeze through the rest of the sales process.

### **Mastering their needs**

- Demonstrate that you understood your prospective client's needs.
- Demonstrate that you're able to prioritize their needs.
- Demonstrate that that you're expertly positioned to addresses those needs.

### **Seizing opportunities**

- Not every solution arises in response to a problem.
- Problems that require a solution are often referred to as "pain points."
- Sometimes solutions arise when you realize a client is missing out on an opportunity.

### **Seizing opportunities**

- For example, you could suggest that a tax client put more money toward their 401k.
- You're not responding to a "pain point" because the client didn't come to you for retirement help.
- Instead you're helping them seize an opportunity by pointing out the significant benefits afforded by their 401k plan.

### **Concentrate on your client**

- Keep the focus on your prospective client.
- Don't spend the whole time talking about your strengths, talents, products and services.
- You need to stay focused on your audience — their needs, their wants, their desires.

### **Concentrate on your client**

- There's a common belief in sales that you sell yourself, then sell your firm and finally sell your product.
- After completing a needs assessment, many accountants will start talking about themselves.
- That's a missed opportunity — go straight to suggesting solutions.

### **Don't get lost in the weeds**

- Highlight the critical information and avoid getting lost in the weeds.
- Your goal is to clearly articulate solutions to your prospective client's most pressing problems.
- State your case simply and succinctly and don't overcomplicate matters.

## Rephrase the issues

- Repeat or rephrase what you learned during the needs assessment.
- Allow your prospective client to restate their needs if your summary is inaccurate.
- Don't proceed until the prospective client has confirmed that your understanding is accurate.

## Less is more

- It's tempting to throw the kitchen sink at a prospective client.
- Don't give into the temptation and instead focus on their top three needs.
- You can address other needs later on, but keep it simple for now.

## Focus on your strengths

- Focus on their needs that connect to the things your firm does best.
- Don't get bogged down by describing the features of a particular product or service.
- Instead, focus on the benefits the prospective client will realize as a result of your solution.

## Focus on your strengths

- Issue-solution-benefit narratives highlight the things you do best.
- If you can stick closely to your issue-solution-benefit narratives, you're more likely to win their work.
- Focus on their most pressing needs and your own strengths to make it clear that you're uniquely qualified.

## Put your ISBNs into practice

- Restate the issue, describe your solution and explain how your solution benefits your client.
- Your goal is to be clear and succinct; don't muddy the waters.
- Make it clear what you provide and how you're different.

## One size doesn't fit all

- Effective solutions don't require glamorous slide presentations or glossy handouts.
- Offering solutions that feel too rehearsed often works against you.
- By foregoing extensive supporting materials, you make your pitch seem more natural.

## State measures

- When offering solutions, use measures and metrics to substantiate your claims.
- Not everyone will remember your words, but most everyone will be able to recall compelling statistics.
- Use exact numbers when you provide measures and metrics.

## Provide examples

- Provide examples of how you've helped similar clients.
- Case studies illustrate how you approached an issue, how you solved it and how the client ultimately benefitted.
- They allow you to promote your competitive advantage from a client's perspective.

## Get a green light

- At the end of each issue-solution-benefit narrative, ask a feedback question.
- Feedback questions gauge the prospective client's satisfaction with each solution proposed.
- Once they seem satisfied, you have a green light to move on.

## Solutions, summarized

- Rephrase your prospective client's needs to ensure you understand the target.
- Share issue-solution-benefit narratives that directly address their needs.
- Use measures to substantiate your claims and provide examples of how you've helped others.

## **Proof please**

- The most common part of any product sales pitch is the product demonstration.
- A demonstration offers proof that what you say is true.
- Anything that brings your claims to life is a worthwhile demonstration event.

## **Seal the deal**

- Offer a demonstration event before asking for the prospective client's business.
- A demonstration event serves to eliminate any doubts that your claims are without merit.
- You can skip the demonstration event if the prospective client indicates they're already sold.

## **In front of your very eyes**

- Think about vacuum salespeople who walk door to door to sell vacuums.
- They can literally walk into your living room and demonstrate that their product works.
- It's the quintessential demonstration event.

## **Illustrate your value**

- Accounting doesn't lend itself quite as easily to demonstration events, but you still have options.
- A demonstration event requires that you create an opportunity to walk the talk.
- Your goal is to provide real illustrations of your value.

## **Strut your stuff**

- One option for a demonstration event is to demonstrate your expertise in a specific service or industry.
- You might offer to review a prior year tax return or prior year financial statements.
- The goal is not to point out failures of their old accountant, but to demonstrate that you might be a better fit.

## **Display your book smarts**

- Another option is to demonstrate your industry knowledge.
- One way to do this is to offer a legislative update that explains a recent code reform.
- Don't just describe the specifics of the change; also explain how the change impacts their situation.

## **Show them the money**

- Another option is to demonstrate that you're efficient.
- Show your prospective client that you can do the work in less time or at a lower cost.
- For example, you can showcase technologies that help save time and money.

## **Call in a pinch hitter**

- Another option is to demonstrate your bench strength.
- Invite other members of your team to participate in needs assessment and proposal meetings.
- Ask them to speak openly about their experience, knowledge and industry expertise.

## **Focus on the nitty-gritty**

- Another option is to demonstrate your attention to detail.
- Show that you have processes in place that minimize human error and ensure timely submissions.
- Your prospective client needs to trust that you won't make mistakes when completing a tax return or an audit.

## **Spark a connection**

- Another option is to demonstrate the value of your network by helping them make connections.
- If you can offer high-quality referrals, you'll be cementing your value right off the bat.
- Draw on what you learned during the needs assessment to consider whom you could recommend.

## **sWalk the talk**

- Clients often point to a demonstration event as the most memorable part of the sales process.
- Demonstrations cement your claims and turn them into gains.
- Decide on the most suitable demonstration event on a case-by-case basis, but don't just skip it.

## **Summary**

- It's your turn to tell your prospective client what you do best.
- Not only are you telling them, but you're also showing them with a demonstration event.
- Be succinct, play to your strengths, focus on the prospective client and make it clear how they'll benefit.

## **ACTIVITIES**

If you're completing these activities on your own, please write down your answers in your workbook. If you're completing these activities in a group, please write down your answers individually. Then share your responses with up to two other people. Look for commonalities among everyone's responses and discuss any differences.

### **Activity 1**

List the top five opportunities you could help your clients to seize. For each opportunity, craft your solution and articulate how the client will ultimately benefit from it.

### **Activity 2**

Brainstorm both actual and pseudo demonstrations of your competitive advantage and claims. These should be ways for you to showcase your expertise and value.

## **CONTINUING EDUCATION**

Practice your "pitch" by connecting the things prospective clients need to the things you do best. Consider how you can provide demonstrations that underscore your claims and competitive advantage.

## **QUIZ**

1. If you succeed with your pitch during the solutions stage — if you hit the right points and present solutions that resonate with your client — chances are you'll breeze through the rest of the sales process.
2. You want to keep the focus on you. It's your turn to talk so talk about yourself and what you do.
3. Your goal is to clearly articulate solutions to a prospective client's most pressing problems, and to make it clear to the prospective client how they'll benefit if they choose you as their accountant.
4. The first step in presenting solutions is to repeat or rephrase what you learned during the needs assessment.
5. In prioritizing their top three issues, it's not important to focus on needs that connect to the things your firm does best.
6. By foregoing glamorous slide presentations or glossy handouts, you can make your pitch seem more natural, by making it clear that you understand and are responding to their individual situation.
7. You don't need to provide examples of how you've helped similar clients to complement your issue-solution-benefit narratives.
8. Reviewing a prior year tax return, analyzing a prior year's financial statements and showing that you can do a task in less time or at a lower cost are all examples of a demonstration event.
9. It's OK to skip the demonstration event in the interests of time.
10. Demonstrations cement your claims and turn them into gains.

## ***NOTES***

## ***FOR MORE INFORMATION***

For more information about additional workshops, or other Replacing the Rainmaker products and services, please visit [ReplacingTheRainmaker.com](http://ReplacingTheRainmaker.com).