

A woman with long, wavy hair is singing passionately with her mouth wide open. She is wearing a dark, patterned shirt under a thick, light-colored fur coat. Her right hand is raised with the index and middle fingers extended. The background is dark and out of focus, with some bokeh light effects.

Hello, it's SME

Achieving Seamless Monthly  
Recurring BD Revenue

# Agenda

1. How to sell without product pushing.
2. Demystifying the services your clients want to buy.
3. Improving your ROI from Spotlight products with key wrap around services.
4. How to gain more leverage in your Business Development delivery.
5. Creating a recurring Business Development revenue stream.



# How to sell without product pushing

- Stop selling; start helping
- Identify the problems your clients are experiencing
- Ask, don't tell
- Offer a Complimentary Client Review meeting
- Focus on value and benefits, not features





# Demystifying the services your clients want to buy

- The 3 freedoms - financial, time and mind
- Stop making excuses why they won't buy
- Refresh your brand and service positioning as modern
- The 3 most fundamental services
- No 'Accountanese' please



# Improving your ROI from Spotlight products with key wrap around services

- Business Planning
- Forecasting
- Financial Awareness Coaching
- Quarterly Coaching
- KPI Improvement Coaching



# How to gain more leverage in your Business Development delivery

1. Use a system.
2. Create a marketing and sales activity plan.
3. Trust your administration team.
4. Train your team and empower them.
5. Deliver services one to many.

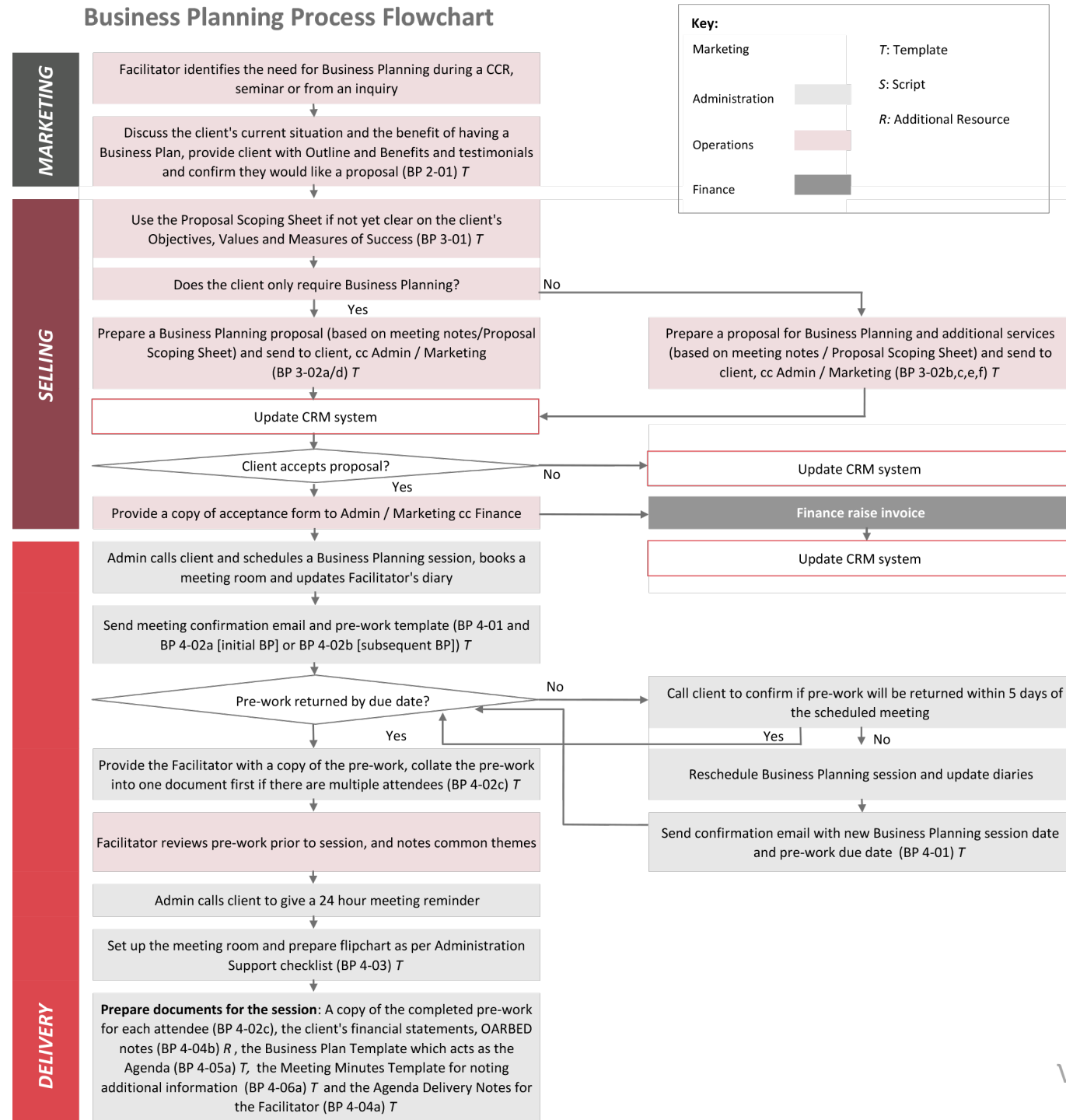


# Do you have a system?

1. Is your service delivered consistently? ✓
2. Do you have standard pricing for each service offering? ✓
3. Does your system cover the marketing, selling and delivery phases? ✓
4. Can you train a competent person within 60 minutes? ✓
5. Does your system include flowcharts, scripts, templates and 'how to' training resources? ✓



# Business Planning Process Flowchart





# Creating a recurring Business Development revenue stream

1. Create a service pipeline.
2. Run events regularly.
3. Annual complimentary meetings.
4. Create service plans / Business Development packages.
5. One to many planning workshops.
6. Annual Business Plan / Forecast review.



# What is The Gap?

Our BD portal provides you with end to end systemised services that your clients will love and that you can monetise.



# THEGAP



## • OUR PURPOSE:

Seamless Business Development  
for Accounting firms.

**Our  
Purpose**

## • OUR VISION:

Accounting firms providing  
enduring value to their clients.

**Our  
Vision**

## • THE BUSINESS WE ARE IN:

Leading edge Business  
Development products &  
knowledge.

**Our  
Business**

# Why re-invent the wheel?

We provide an end to end Business Development Services solution for accounting practices.



Everything you need to market, sell and deliver cost-effective Business Development to your clients.

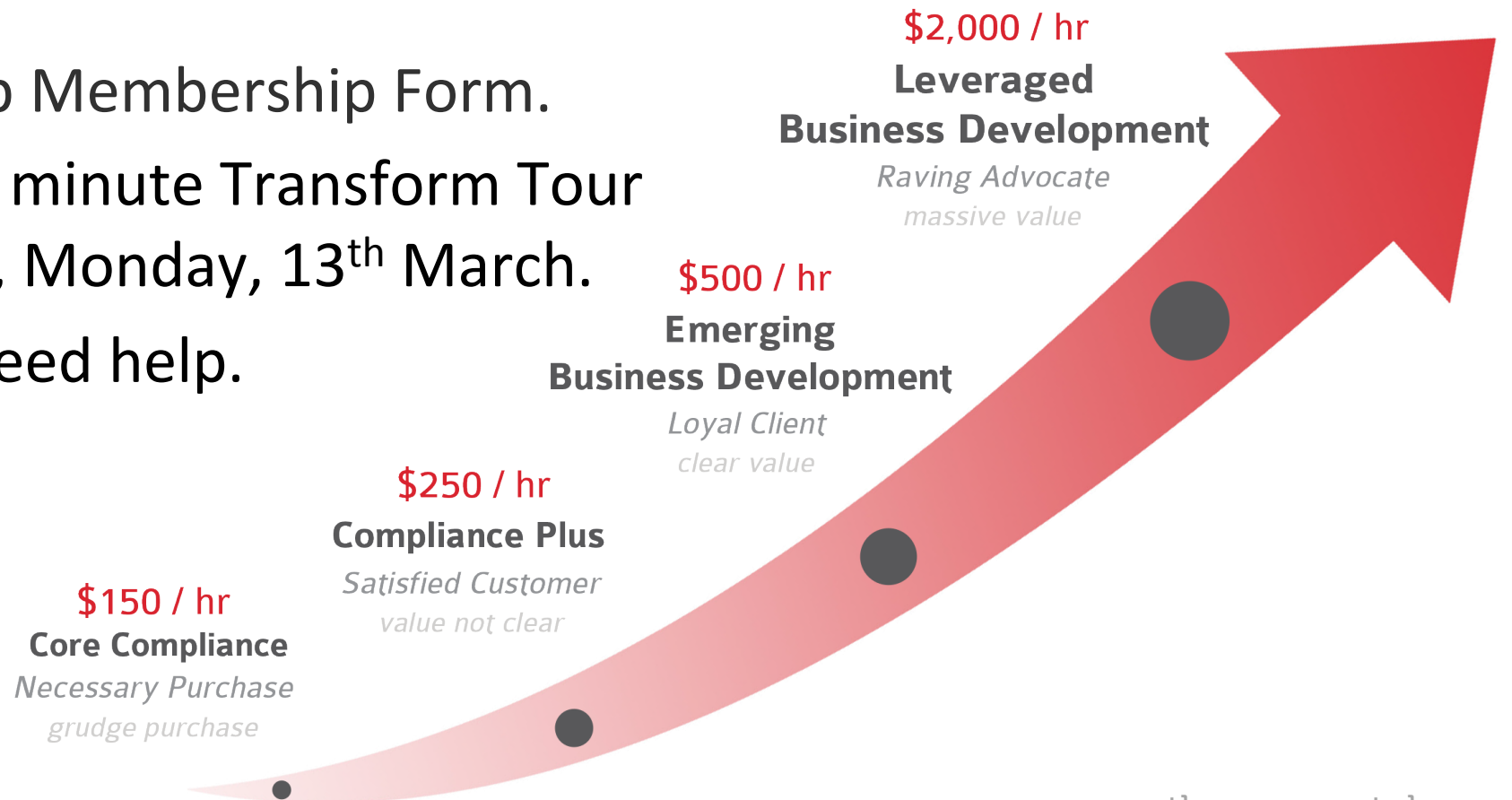




# Next steps...

## Your 3 most important actions from today:

1. Complete your Gap Membership Form.
2. Register for our 60 minute Transform Tour of The Gap at 2pm, Monday, 13<sup>th</sup> March.
3. Contact us if you need help.



# Parting thought



*'You can get everything in life you want if you will just help enough other people get what they want.'* - **Zig Ziglar**

