

## From Initial Meeting to Profitable Client (Script Handout)



### Greetings

- Introductions, timecheck and agenda

### Discovery

- *What brings you in here today?*
- *What are you trying to achieve in [xxx] area?*
- *In the area of [accounting / business advisory / tax planning], what are your key priorities?*
- *What challenges do you have around [xxx]? What are they costing you?*
- *What causes you the most frustrations?*
- *What's your biggest concern when it comes to changing professional providers?*
- *What benefits do you see in getting this solved?*
- *When this is fixed, what upside will you see?*
- *Why would you find it useful to solve this problem?*
- *Is it important for you to get this fixed?*
- *What's your appetite for addressing this problem? What makes you say that?*

### Qualification Questions (if these haven't emerged already)

- *Do they know what they want? (So for you, success would look like xxx, is that right? I believe you're interested in making significant improvements in xxx, did I hear that correctly?)*
- *Can they afford me? (On average, how much have you spent on this over the past few years?)*
- *Do they know what their timing is? (When are you looking to engage [someone / a new firm]? How much of a priority is it for you to make a change?)*

- *Are they the stakeholder / decision maker? (Do you need to get anyone else involved in deciding to go ahead? If we decide to go ahead, how soon could we get started?)*

- *What else have you tried?*
- *Have you looked for a new [service provider] previously?*
- *Are you speaking with many other providers?*

### Summarise And Educate

- *So what I heard is... [use their words & numbers]*
- *Is that right? And that's important because...*

### Compelling Narrative

- *I've worked with someone in a similar situation.*
- *[PRISON] They were struggling with...*
- *[GOAL & HESITATION] They wanted... but weren't sure about...*
- *[AFTER] We helped them achieve... And they felt...*
- *If we were to go ahead and get similar results for you, what benefits do you see?*

### Set expectations

- *This is a two-way relationship where we both need to work together... Here's how I work with my best clients...*

### Recommend a way forward

- *For your situation, where you're looking for [abc] outcome, I'd recommend that we start with [your process].*
- *Share your fees (like saying your phone number)*

### Make an Offer

- *Would you like to go ahead?*
- If YES! be ready with the next steps*
- If NO, find out why with curiosity*