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Should Use

Now that busy season for many accounting firms is drawing to a close, more attention turns to expanding business and developing new business. While every firm has a different way of tracking growth and revenue, BKR International reminds firms of four grow

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know about your firm goals and the types of clients you seek. Explain the value you can deliver so that referred prospective clients are a good fit.

Client Expanded Business

Client service masters in your firm should schedule regular conversations with existing clients to identify additional service needs or concerns. Expanded business is the hallmark of strong client retention and satisfaction. In your clients' key markets, review industry trends that may affect them in the coming year. Discuss the account with others in your firm who may have fresh ideas. Send a letter with new recommendations or schedule a discussion with prepared questions and insights. Clients will appreciate this forward-thinking approach.

New Clients

Although a significant percentage of business growth should come from existing clients, cultivating new clients requires a clear alignment between marketing and sales processes. Marketing staff need to know how many new clients — and in which industries — the firm needs every month or quarter to reach annual growth goals. Sales staff should target the average engagement required from these new clients. “We look at which niches are ripe for growth, not just in our local area but also nationally,” said Jason Tonjes, managing partner of Bland & Associates in Omaha, Neb., and the BKR International Americas Regional Chair. “We reach out with distinct marketing as well as sales strategies to communicate our firm's value.”

As new clients come into the firm, pursue a clear onboarding process to build trust in the team and deliver results, Tonjes added. If not, you risk client turnover.

Pipeline 30-60-90

When marketing and sales are aligned, each function can review a pipeline that records the number and types of marketing touches required to close. Marketing tees up the sales leads to contact and engage prospects with solid data and a convincing

offer. Monthly pipeline meetings will inform the team on sales opportunities up to

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Maureen Schwartz is the executive director of [BKR International](#), one of the top 5 global accounting associations, representing the combined strength and market exclusivity of more than 160 independent accounting and business advisory firms in over 500 offices and 80 countries.

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