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to-do list. They think they need to create the service, train their people, and develop a big presentation to take to clients.

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**By John Hubbard**

If there's one silver lining to the COVID-19 pandemic, it's that the widespread, accelerated acceptance of virtual work has lowered the barriers to entry for getting a new service to market. There are so many things CPAs can be doing for their clients right now that deliver incredible value for the client, and create value for the firm.

But if face-to-face business development and sales are how you've always done

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sell the tickets, then produce the show.

Talking with your clients is the fastest path to launching a new service. Rather than trying to figure out which services your clients need, ask your best clients what they want. Lead them through a discussion on the Dangers, Opportunities and Strengths (DOS) facing their business. Based on that conversation, look for advisory and consulting services you can offer.

An excellent question to ask during these conversations is The Relationship Question from [Strategic Coach](#): “If we were having this discussion three years from today, and you were looking back over those three years to today, what has to have happened, both personally and professionally, for you to feel happy about your progress?”

Having these conversations positions you as a consultant. The client tells you what they're willing to pay for.

## Package & Price

Packaging and pricing advisory and consulting services is an area many CPA firms struggle with if they're used to billing hourly for compliance services. If you're able to solve a client's problem and provide the advice they need, you need to base your fees on the value of the service to the client – not an hourly rate.

Give your clients three paths to success. These can be “bronze, silver and gold,” or “small, medium and large” – whatever names you want to give them. All three packages make the client's business stronger. The difference is the speed at which it will happen.

The key is to ensure that everyone in your firm is pricing these services consistently. During our Certified Consultant Training, we perform an exercise in which we ask everyone in the room to write down what they would charge a client for strategic

planning services. When our participants reveal their numbers, the results range

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your ability to deliver value virtually. Often, this involves a mindset shift for both parties.

There are a wide variety of tools available to help you, but the key is to keep it simple. Our team has been delivering our consulting services virtually for months using three tools – two of which you're likely already familiar with:

1. **Zoom.** Many firms have been using Zoom for video conferencing over the past few months, but surprisingly few are utilizing this technology to its full potential. Familiarize yourself with its screen sharing, polling, breakout rooms, transcripts, raise hand and recording features. Whenever possible, have two team members participate in each business development meeting: one to do the talking and the other to ensure everything runs smoothly on the back end.
2. **PowerPoint.** Nearly every professional is familiar with this tool for creating slide presentations. Share your screen over Zoom to present to your client.
3. **Miro.** This is a newer tool in our toolbox. It's an online, collaborative whiteboard. If you've ever used post-its to brainstorm or organized ideas on a whiteboard during an in-person meeting, Miro replicates that feeling in a virtual environment.

The tools you rely on to deliver services virtually may be different. It really doesn't matter what you use, as long as they enhance the experience for your clients rather than present an obstacle.

## Coaching & Accountability

Offering ongoing coaching and accountability creates the biggest impact for your clients. Many CPAs worry that consulting is a one-time event, while compliance is

ongoing. The key is turning that one-time engagement into ongoing work through

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healthier in the long run, provided you approach it with the right mindset. Everything may not be perfect the first time you have a DOS conversation with your clients, virtually deliver a consulting engagement or participate in a coaching call, and that's okay. Learn from the experience, and you'll get better. If you spend too much time perfecting your offering before you get started, you'll never move forward.

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