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embrace the idea of probing our clients more deeply than their taxes or ...

Garrett Wagner • Mar. 12, 2021



Does any other part of the job illicit more disdain than selling? For accountants, selling is about as natural as a cat taking a bath. But our practices cannot survive without new clients or expanding our services among our current ones.

Let's consider leaving sales behind in 2020, along with the rest of the chaos. Instead, think of a future where we help rather than sell.

By providing solutions to new prospects and current client, we focus on their problems and challenges—rather than our own anxieties to hit a number or fulfill some obtuse obligation.

By shifting into the mindset of solution providers, we become consultants and

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~~moving away from looking backwards to becoming the forward looking advisors.~~

This transition means we come to learn the client's business, so we can anticipate what is next on their horizon—preparing not only tax solutions, but other ways they might stay ahead of the inevitable. What clients do not want a dashboard offering trends and some sort of predictive analytics, for instance? Our clients have problems, and they are looking for ways to solve them. Who better than you to research and rally on their behalf?

This is the key pivot you need to make. How often do we find that a salesperson is pushing us to buy something we don't want simply because they have only one product to offer? They are limited by the features and benefits of a one trick pony, and even if that person senses we do not need what they have to offer, there is little choice but to hawk that single product.

As a trusted advisor and unique knowledge of the client's business, you are in a position unoccupied by any other.

Build upon this role and unique knowledge to provide clients with solutions. This is where true value rests. Interestingly, clients may not know what it is they even need or what the threats may be short- or long-term. They are busy being an entrepreneur, driving revenue, fighting costs, holding onto valued key employees.

Not every client needs a dashboard. This is about understanding the challenges each client may face on a daily basis and how can you help them to solve it. That is what they truly need, and it is how you will remain relevant in a world where the competition is fierce for keeping anyone's attention.

The Comfort Zone

With your mind open to the idea of “help” rather than “sell” you are in a frame of

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They may take a minute to formulate what to say and how to say it. Let that silence reign. Let them speak first to fill that silence. That silence is the sound of a new beginning.

Let them to drive the conversation as you remain naturally curious. Perhaps you’ll find you can offer a solution to some part of their problem—or you know someone who else who can. Either way, you have succeeded by opening a door to a new dimension in your relationship. You are a trusted advisor, the professional unafraid to talk about things that may have nothing to do with lining your wallet. Businesspeople appreciate that. After all, you do too, right?

Resist the urge to make everything about. Listen. Focus on understanding where things stand today—and how they got here.

True Nature

Like peeling an onion, sometimes people need to peel back many layers to get to the actual problem. For example, if they mention turnover is the biggest problem, is it because a number of employees are leaving for better pay across the street? Or is it really the monotony of the work—which gets you to thinking about the lack of an inventory management system?

Perhaps this client started small. Yet, they still rely on paper records to track an increasingly complex inventory process. They are burning people out, doing everything by hand, and the best people conclude this is madness and go to greener pastures. In this example, your client does not need to keep raising wages. She needs an inventory management system.

Our roles have never been so important. Luckily, we do not need to be salespeople to sell being resourceful or experienced. We can evolve into better helpers more easily than better salespeople. By helping our clients to understand the true natures of their

problems, then finding solutions to those problems, we deepen these relationships

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