Accounting Plus Training Notes

# Qualifying the prospective client.

OK, so you have had an initial chat with someone and briefly outlined how it all works and it looks like they could benefit from our services, but before you jump in the car you need to make sure that they are worth a visit and that they are OK to meet up with you.

*“Fail to Plan, then Plan to Fail”*

Hello ……., It’s \_\_\_\_\_\_\_\_\_\_\_ from Accountancy Plus, I’m just calling to say thank you for your enquiry and to see if you are eligible to join our Discount Club. Do you have a couple of minutes to speak with me?

As you are aware, Accountancy Plus have a whole range of services that can save businesses a great deal of money, but before we go any further I have one simple question to ask that will enable me to see if indeed you can benefit from our services, so that I’m not wasting your time if it is not the case.

First of all, do you have the authority to act on behalf of the company?

If not who does as you need to speak to **them**.

Secondly - does your current accountant charge you more than £300.00 to do your Tax Return, Year End accounts and HMRC submission?

If it’s more than £300 Yes they do! OK great then we can definitely save you money.

I’d like to visit you either at your home or office, so that I can go show you exactly what we can offer? Don’t worry, there’s no hard sell, I just want to explain the options that are available and it will only take about 30 minutes of your time. I should be able to save you a significant amount of money.

OK – When and where will be best for you?

*Book time and place using your diary. Don’t just guess if you are available as having to cancel and re-book is un-professional and embarrassing.*

Request that they find out how much they currently pay their accountant, and list all of the services ready for when you meet.

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If it’s less than £300 Well, that’s a really good price they are providing for their services.

I’m sorry to say that we will not be able to help you to save money on this at the moment. Unless of course you are un-happy with their services and are looking for an alternative practice. Is that the case?

Yes they are! OK great then we can definitely save you money.

I’d like to visit you either at your home or office, so that I can go show you exactly what we can offer? Don’t worry, there’s no hard sell, I just want to explain the options that are available and it will only take about 30 minutes of your time. I should be able to save you a significant amount of money.

OK – When and where will be best for you?

No they’re not! OK I understand, but please let us know if things change however!

Thank you for your interest, and I wish your business well for the future.