
## Wilson's Writings

**We thrive on a challenge at ConvergenceCoaching. In fact, it isn't unusual to hear us say, "the bigger and more difficult -- the better!"** This year has provided many opportunities to test our ability to manage difficult situations as the recession and slow recovery has impacted our clients, family members, friends, colleagues, and us, too. Assisting clients with staff reductions, salary freezes, bonus eliminations, and other important (but painful) cost adjustments has been the norm.

We've also had an opportunity to assist clients in the development of their marketing, business development, and social media programs. And, because revenue generation is so critical for so many, **we decided to focus this issue of Coaching Concepts on business development and personal marketing strategies to help you to generate top line revenue and begin easing your financial burdens.** In **Leadership Lessons**, we'll share four must-do business development strategies to ensure a steady flow of new business and in **Practice Perspectives**, we'll drill down on two of those strategies – client surveys to conduct during busy season and sales pipeline management – both of which you can begin implementing right away.

In addition, our team has worked hard to organize all of our marketing and business development tools, templates, and resources in our **Marketing and Business Development Toolsets** , available via our new ConvergenceCoaching Learning Center. **The learning center is a new addition to our firm resources, offering access to our toolsets, instructor-led web seminars, and our new and exciting distance learning self-study courses.** Be sure to read more about these exciting developments in **New News** and **visit www.convergencelearning.com to access our first three self-study courses, Managing Difficult Conversations Successfully, Mastering the Art of Time Management and Maximizing Your Professional Image, which are designed to help you and your team be more productive this busy season.**

As we enter this blessed holiday season, we are focused on the many blessings of this tough economy. It has provided an opportunity to go back to the basic fundamentals of running our practices, to eliminate weaknesses or redundancies, to revel in victories big and small, and to appreciate the blessings that we have much more. **You are one of those blessings for our team at ConvergenceCoaching, and we are profoundly grateful for your friendship and support.** We look forward to working with you to better our profession, communities, this nation, and our world in the sure-to-be-brighter New Year ahead.

Peace and Joy,

*Jen*

Click here for a special holiday greeting from CC, LLC

## Leadership Lessons

### Marketing Activities You Can Do

Given the economic uncertainty, many of our CPA and IT firm clients and friends have made a renewed commitment to marketing and sales activities in their firms. With thinning pipelines, increased staffing capacity, and conservative purchasing decisions being made, it's more important now than ever to focus on activities that many team members can participate in to generate new opportunities for your firm.

One way to renew your firm’s marketing and sales commitment is to identify the activities your leadership team can commit to, **so this edition of Leadership Lessons will focus on four personal marketing activities that you and other managers and partners in your firm can undertake.** Doing so will help you smooth the peaks and valleys in your practice, uncover new ways to serve your clients, and identify opportunities you can follow up and close now.

While we recommend that your firm has an overall marketing strategy in place, and you can read our blog post on developing your firm’s marketing strategy, you don’t have to wait for a formal marketing plan to conduct these personal marketing activities and make a big difference. We will outline the four marketing activities here and then drill down on two of them – meeting with and surveying your clients and tracking your opportunities – in our **Practice Perspectives** article.

The four personal marketing activities you – and each of your leaders - can personally affect include:

- **Meeting with and surveying your clients.** Meeting with your clients will uncover new opportunities within your existing client base and also draw them closer to you as you identify new ways to help them achieve their business goals and solve their challenges. Whether you meet with your clients over the next several months in tax, audit, or accounting services meetings or you proactively reach out to them to schedule lunch, consider assigning each client service owner the responsibility to meet with their clients and complete a short survey - just four or five questions - that would help you identify unmet needs so you can fulfill them. In our **Practice Perspectives** article, we’ll discuss an approach and point you to a sample survey that you can implement with your team.

- **Participating in networking activities.** One of the successful tenets of any marketing activity is consistency. Continue to participate in – and show up for – your networking, conference, association, and board meetings to build your firm’s and your personal brand during slower months and busy season(s), too. Being consistent in your attendance at key association and group activities demonstrates that you’re not too “busy” for new clients or referrals and shows your commitment to the organization and its members.

  Help younger staff identify organizations that they can meaningfully participate in – including new social networking communities – and then teach them how to successfully network. Begin by taking them along to your networking events so they can see “how it’s done.” Remember to teach them the basics that we take for granted, such as bringing business cards, introducing yourself to people you don’t know, setting a goal that you have to achieve before mingling with friends, and identifying leadership opportunities to get involved deeper in the organization.

- **Conducting referral meetings.** In addition to participating in networking activities, proactively meet with your referral sources on a regular basis. You have to eat at some time during the day, and meeting with one referral source per week for lunch (rather than eating at your desk!) will give you an opportunity to strengthen your relationships with your referral partners, uncover potential new business, and break up the week by getting away for a brief respite of proactivity. Track your referral source meetings to help you identify where you should be investing more in the productive relationships and where you may need to develop new referral sources when others are not progressing.

  Referral source meetings are another opportunity to teach your people and “succession plan” by developing rapport between your younger people and the next generation within referral sources’ organizations. Invite one of your team members to lunch and ask your referral source to do the same to make an introduction, teach them what happens in those meetings, and begin building new relationships so the alliance between your two organizations continues into the future.

- **Tracking your activities in a sales and referral pipeline.** Your sales and marketing activities will result in more success when you track your opportunities in a sales pipeline. Review it on a weekly basis to determine what sales actions you’re going to take to move opportunities forward or which referral sources or networking organizations need your attention. Doing so will increase the results you reap from your sales and marketing activities. Tracking these opportunities gives you visibility to the next step and helps ensure you’re following up appropriately, which in turn will help you close more business because opportunities won’t be as likely to fall through the cracks. In our **Practice Perspectives** article, we’ll explore a simple pipeline process you can use individually or incorporate into your firm’s overall marketing and sales culture.

When you regularly prioritize and commit to specific marketing activities, the long-term success of your firm is more secure, and you’ll build your book of business, too. Investing the time in these activities enables you to reap the rewards of your long-term investments in your clients, networking organizations, and referral source marketing activities. You will likely close more business with existing clients and generate a few new clients for your firm, too!

You can use a simple personal marketing plan template to identify your networking activities, referral source meetings, and client meetings and then track them in the pipeline provided in the **Practice Perspectives** article. Don't take your foot off the business development gas pedal during busy season! It is important to keep up the momentum and continue to set new goals in these areas to ensure that you are continually identifying new business opportunities so you reach your slower months with the right mix of work to match your capacity. Your consistency is key.

**We suggest that each partner and manager in your firm establish a goal for each of these four marketing activities that they will commit to for the coming year. Then share your commitments with someone on your team to help hold you accountable.**

For additional information on how you can implement personal marketing activities in your firm, e-mail Tamera Loerzel at tamera@convergencecoaching.com or call (952) 226-1780. Connect with me at http://www.linkedin.com/in/tameraloerzel.

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## Practice Perspectives
### Client Meeting Strategies

You may be surprised how many times your clients are telling others, "I wish my CPA would reach out just to check in with me" or "The services I receive from my CPA are fine, but I wish he/she would be more proactive with advice to help me make decisions that enhance my business." In today's economy, you have every reason to be proactive and identify new ways to add value for your existing clients, who may need additional services and are already familiar with your firm, people, and processes.

In this article, we will explore an approach to client meetings, surveying your clients, and also tracking any opportunities that arise to provide accountability for the goals you have set for your personal marketing plan as discussed in **Leadership Lessons**.

#### *Client Meeting Surveys*

As we identified in **Leadership Lessons**, one of the marketing activities you can do to deepen client relationships and uncover new opportunities to serve them is to meet personally with each of your clients. Conducting client meetings will enhance client satisfaction and retention for your firm, uncover immediate opportunities to serve your clients, re-fill your pipeline in a low cost manner, and create shorter sales cycles with less effort because you are opening up an opportunity to sell new services to existing clients (versus strangers to the firm). Perhaps most importantly, when you are proactive with your clients, you minimize the impact of potential competitors who are reaching into them – especially in this market!

Conducting a short survey during client meetings will position you – and your firm - as someone who cares and acts as an advisor rather than just a tactical service provider. It will give you the ability to elicit:

- **Satisfaction feedback** – Start your meeting by asking one or two questions about how your firm is doing as a whole to gauge satisfaction and find out how you can enhance your relationship with the client.
- **Information about your client's existing situation** – Then, provided the satisfaction responses are positive, ask a few open-ended questions about their business, the challenges and issues they're facing, what keeps them up at night, and their plans and goals for the upcoming year.
- **Plans or needs for the upcoming year, potentially identifying additional service opportunities** - Ask two or three questions that would uncover opportunities for specific services you would like to highlight. For instance, for your private company clients, you may ask, "Do you have multi-state tax requirements? If so, how are you currently addressing them?" and, "Does your firm have a pension plan? If so, how are you addressing your pension plan audit today?"
- **Potential referrals** - Finally, your clients are a great source for referrals, so be sure to ask them (assuming they are happy with your services!) for referrals during your meeting. Remember that your clients are used to the past years of "plenty," when they may have been concerned about the time you had available to service their needs, so it is appropriate to share that you do have the capacity to accept their friends, family, or colleagues as new clients.

In general, a successful client survey will be fairly short and cover these four areas as well as any changes in contact information that may be applicable. If you don't already have it, ask for your client's e-mail address and find out if they are using LinkedIn or Twitter for future communications, too. Be sure to customize your client meeting surveys by client type to ensure the correct service questions are covered.

To get started on your own client survey, consider using our template found in our Marketing Toolset at www.convergencelearning.com. If there are clients you are not able to meet with personally, consider sending them an online or paper survey or holding a "check in" phone call.

Create a clear follow-up plan before the survey is deployed. It is important that each opportunity and all survey data is acted upon, including resolving any satisfaction issues that clients raise. If nothing happens as a result, neither your clients nor the firm will benefit, and your team is not likely to support the effort next time. When you compile the data from all client service owners, evaluate the overall feedback, highlight both positive and negative trends to your satisfaction questions and cross-selling opportunities, and develop action plans around your findings. Consider assigning one person to compile and review the surveys. Then they should ensure that follow up with clients who raise specific concerns or issues occurs and that contact information is updated in all the appropriate systems.

***Track Your Client Opportunities in a Pipeline***

When you ask clients about additional ways you can serve them in your client meeting surveys, you are likely to uncover opportunities for new business. All new service opportunities should be entered and tracked and reported on in a sales pipeline - just as you would "new name" prospect opportunities.

Implement – or recommit to – regular pipeline meetings that include all sales opportunity owners, and identify the appropriate person to follow up with those clients who express a need. Use the pipeline meetings to work to close business that stems from your client meetings to realize a return on your investment and show your clients that you care about their business and overall success.

If you don't have a pipeline tool, feel free to use the simple Excel grid found by clicking here. Be sure to capture the following information in your pipeline (which should be used for all opportunities, both for new and existing clients):

- The client owner, who is responsible for moving the prospect through the sales process
- Your contact's name(s), organization if applicable, and contact information
- A brief description of each service and/or product that is needed
- The next follow up date and last follow up date for each contact
- The next follow up action
- The result or outcome

In addition, indicate the probability that each opportunity will close by using a percentage or a simple A, B, or C rating. This will help you prioritize and focus your team's energies on those most likely to close. Record the source of each lead, which will help you track the effectiveness of marketing campaigns and your client meetings, too.

You can use a pipeline tool to track your referral source and networking meetings, too. This will give you a structure of accountability to report and measure on the goals you set for your personal marketing activities as we discussed in **Leadership Lessons**. Consider implementing a firm-wide process for capturing all of your referral source and networking activities by having each team member update their opportunities on the pipeline and then review it with their career advisor or mentor or in your marketing or sales meetings.

**Use our simple client meeting survey idea to deliver better, deeper service to your clients and a pipeline process to close more business and reach your personal marketing goals.** For additional information about surveying your clients and implementing a sales pipeline process, contact Krista Remer at krista@convergencecoaching.com or (402) 891-6393. Connect with me at www.linkedin.com/in/kristaremer.

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## News News

### *Service Spotlight: Announcing Our New Distance Learning Self-Study Program!*

We know how hard it is to get away from the office, especially during busy season, and the high cost of travel these days can make investing in CPE expensive. At ConvergenceCoaching, we recognize the need to have access to **high-quality, difference-making soft skills CPE** without having to travel. That's why we've developed an online distance learning program that will enable you, and members of your team, to take high-quality courses **anytime from anywhere**.

Our online self-study courses, the first of which are **Maximizing Your Professional Image, Managing Difficult**

**Conversations Successfully**, and **Mastering the Art of Time Management**, are perfect for preparing your team for the busy season ahead and to train everyone on the same courses, in the same way, over time. New employees can easily "catch up" on what others have learned at their convenience - after hours, from home if they choose, and at their own pace.

**Visit www.convergencelearning.com now** to review available course agendas and to register. For more information about our distance learning training options, including how you can license our online self-study platform for your firm to realize the convenience of customized, always available training for your entire team, e-mail learningcenter@convergencecoaching.com.

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## *Marketing and Business Development Toolsets for Practice Growth*

Our **Marketing** and **Business Development Toolsets** are filled with **valuable templates, tools, articles, and resources** to help you grow your firm. We know that in this current economy, it's vital for firms to revisit their marketing strategies, teach their up-and-comers how to develop new business, and implement tactics to generate new client engagements, deepen existing client relationships, and re-energize referral relationships. Our toolsets can help you do just that!

The **Marketing Toolset** costs only $149 and contains almost **50 templates and tools and 14 articles** to help you develop your firm's marketing plan, define your competitive value proposition and brand identity, support your lead generation and personal marketing activities, and help you organize your firm's marketing function. Our **Business Development Toolset** costs only $99 and contains over **35 templates and tools and 11 articles** to help you develop your firm's cross-selling and sales functions. **Purchase both toolsets together for just $199!**

To view the list of tools and articles and to order your toolset(s), **go to www.convergencelearning.com**.

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## *Congratulations Are in Order*

ConvergenceCoaching's own Jennifer Wilson has been named to ***INSIDE Public Accounting*****'s Top 10 Most Recommended Consultants** list for the second consecutive year. In addition, she was recently honored for the seventh time as one of ***Accounting Today*****'s Top 100 Most Influential People in Accounting**. Our whole team is proud of Jennifer's accomplishment and the recognition of our team for the difference-making work we are all "up to" with our clients!

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## *Need a Retreat Facilitator or Want to Develop Business Development or Leadership Skills in Your Firm?*

If you're planning a **firm retreat or strategic planning meeting,** we can help your firm's leaders ***gain unity*** on the direction you're taking the firm, define the ***measures of success*** for getting there, and facilitate a working retreat with your leadership team. We'll work with you to identify your firm's key priorities and then create a plan to address them with a structure of openness, honesty, and true ***accountability*** during the retreat.

In addition, our **skills building programs** for partners, managers, firm administrators, and staff span all areas of your practice, including ***business development, client service, leadership development and future leader training, succession planning, and human resource and management topics.*** All of our courses and workshops can be customized to meet your needs and objectives for firm retreats, in-firm training activities, and other firm events.

If you would like to discuss your **retreat or tailored web-based or in-firm training for your firm or association**, please contact Krista Remer at krista@convergencecoaching.com or (402) 891-6393.

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## *Connect With Us Online!*

**At ConvergenceCoaching, we believe that social media technologies are transforming the way we communicate, and we want to connect with you!** Join us on our firm's LinkedIn and Facebook pages and also follow Jennifer Wilson's "tweets" on Twitter by clicking the following links:

**Twitter**: http://twitter.com/JenLeeWilson

**Facebook**: http://tinyurl.com/yf6jfme

**LinkedIn:**

- www.linkedin.com/in/jenniferwilsonprofile
- www.linkedin.com/in/kristaremer
- www.linkedin.com/in/michellebacaprofile
- www.linkedin.com/ruthleerichter
- www.linkedin.com/in/tameraloerzel

In addition, be sure to **read and subscribe to our blog, "*Inspired Ideas*"** (**http://blog.convergencecoaching.com**), to gain insights into topics such as the role of effort, getting inspired, developing more business, and IRS regulations. To receive an e-mail notice each week when we post, simply enter your e-mail address and click the "Get e-mail updates" link on the right-side panel.

If you would like to contribute to ***Inspired Ideas*** as a **guest blogger** or learn more about blogging, social networking venues, or **how we can help you create a social media strategy for your firm**, please contact Jennifer Wilson at 402.933.2900 or jen@convergencecoaching.com.

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### *Upcoming Web Seminars*

The ConvergenceCoaching team offers a **web seminar series** designed to help you develop "soft" skills in a variety of areas, including leadership, marketing, sales, and human resources.  We also provide continuing professional education (CPE) credit for those who would like it for a small administration fee of $39.

Please watch your e-mail inbox for invitations and plan to join us for our upcoming 75-minute web seminars, which will be held at 11:00 a.m. Eastern Time on the following dates:

- **January 19 – Packaging Your Small Business Services**
- **February 9 – Being a Leader Regardless of Your Role**

Register today at www.convergencelearning.com**.**

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## *Save the Date for Our Atlanta Training Workshop!*

ConvergenceCoaching will be offering a training opportunity for those in and around **Atlanta, GA** on **May 25, 2010**. This one day course on **Developing a Culture of Ownership and Accountability** for partners, managers, and other firm leaders will help you improve your ability to lead and gain methods to create a culture of accountability throughout your organization.

Mark your calendars and plan to attend! E-mail lisa@convergencecoaching.com to learn more or to express an interest in attending and/or sending your team members.

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## *Client Corner*

### *Our Clients are on the Move and Earning Well-Deserved Awards!*

**Arxis Technology, Inc.** recently earned a number of awards for their superior customer service and performance, including the Sage Customer Excellence Award, Sage Presidents Circle, and Sage Million Dollar Club. Congrats!

**Barfield Murphy Shank & Smith** was recently named one of the *Wall Street Journal*'s Top 15 Best Places to work – wow! The *Journal* touts the company's efforts to accommodate employees' personal needs, including remote work options and flexibility or reduced hours, if needed, to attend personal events during the workday. Read more here.

**Beard Miller Company** (bmc, LLP) merged with Parente Randolph to become the top regional CPA firm in the northeast. The combined firm will have over 170 partners and more than 1,200 team members throughout Pennsylvania, New York, New

Jersey, Maryland, Delaware, and Texas. Congratulations to our friends – old and new alike!

**Hurewitz, Boschan & Co. LLP** was featured in *Accounting Today* and its internet counterpart, WebCPA, on the benefits of young professionals striking out to start their own firm as the two owners of this royalty audit group did last year. Read the full article here.

**SystemLink** was recently honored with a host of awards for their 2009 performance and forward-thinking, including the Sage Presidents Circle, *Accounting Today* Industry Pacesetter, Bob Scott's VAR Stars, and as a member of the Sage Accpac ERP Global Group. Great work!

**Windes & McClaughry** announced John Di Carlo as their new Managing Partner. John succeeds Jack Hinsche who retired on June 30th after 38 years with the firm. We wish both of you the best as your transition continues! In addition, John Dicarlo and the firm have been recognized with well-deserved awards. John just received the John C. Wallace Dream Maker Award from the Boys & Girls Clubs of Long Beach, *Accounting Today* listed Windes & McClaughry as one of the 2009 Best Accounting Firms to Work For, and *INSIDE Public Accounting* has named them one of the top 20 firms in the nation for long-range planning, which recognizes their continued maintenance of strategic, succession, and marketing plans, partner training programs, and other criteria. We applaud your work!

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## SAS 115 Toolkit for AICPA PCPS Members

The AICPA's PCPS section has made a valuable SAS 115 toolkit available to their members. The toolkit provides guidance on the implementation of SAS No. 115 along with several tools and templates, such as a web page and newsletter template, FAQ document, and more to assist you in educating and communicating the impact of SAS No. 115 with your clients. Find out more at www.aicpa.org/pcps under the Resource tab.

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## Former Editor in Chief of Accounting Technology Named as Executive Editor of The Progressive Accountant

Industry insider, Bob Scott, was named as the new Executive Editor of PMG's *The Progressive Accountant* and its portfolio of digital resources including industry-specific web sites, e-newsletters, web seminars, live events, video, podcasts, and content/reviews. Visit www.pmgb2b.com for more information about the Progressive Media Group.

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## Welcome New Clients!

The ConvergenceCoaching team welcomes our new clients to the Convergence circle of friends! Warmest welcome to:

**Beasley, Mitchell & Co. LLP** in Las Cruces, NM

**California CPA Education Foundation** in Redwood City, CA

**CPA Leadership Institute** in Chicago, IL

**HBE Becker Meyer Love, LLP** in Lincoln, NE

**Hurewitz, Boschan & Co. LLP** in Los Angeles, CA

**Kennedy and Coe, LLC** in Wichita, KS

**Marvin and Company, P.C.** in Latham, NY

**Mengel, Metzger, Barr & Co., LLP** in Rochester, NY

**New Mexico Society of CPAs** in Albuquerque, New Mexico

**PKF North American Network** in Duluth, GA

**Price CPAs** in Nashville, TN

**RLB, LLP** in Guelph, Ontario, CAN

**Upstream Academy** in Helena, MT

We are grateful that you have taken the ConvergenceCoaching leap of faith and look forward to making a difference for you and introducing you to our network of clients and friends!

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### ***Spread the Word!***

If you know someone who would benefit from receiving their own copy of our Coaching Concepts e-newsletters along with invitations to our web seminars and other events, e-mail their information to us at info@convergencecoaching.com.

**Happy Holidays!  To celebrate the joy of this season and honor our hard-working team at ConvergenceCoaching, we will close our offices from December 24 through January 3, reopening for business on Monday, January 4, 2010.  We look forward to being of service to you in the bright New Year ahead!**

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