


**Session #402 - Marketing Yourself -
Leslie Shiner**



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The SLEETER GROUP

**Marketing and Selling Yourself,
Your Expertise, and Your Firm**

Leslie C Shiner
Owner/Principal
The ShinerGroup



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The SLEETER GROUP

Leslie Shiner


- The ShinerGroup – Owner and Principal
- Financial & management consultant for over 20 years
 - MBA in Accounting and Finance from U.C. Berkeley
- Intuit QuickBooks Certified ProAdvisor
- Certified QuickBooks Enterprise Solution 7.0
- Sage Software Certified Consultant
- CEDIA Certified Trainer, Top 10 Instructor (2005 and 2006)
- Author:
 - *Best Fit Construction Management Software*
 - *Implementing New Business Management Software*
 - *Health Checkup for Your Construction Business*

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Workshop Objectives


- Learn the secrets of building long-term relationships
- Uncover ways to focus your practice to achieve increased billing rates and better client quality
- Discover ways to market on a small budget, explore business opportunities, and ask for referrals
- Analyze the advantages and disadvantages of working on your own as well as becoming part of a larger firm

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Create Self Assessment

- Look at your talents
 - What do you do very well?
 - What kind of clients provide the most revenue?
 - Discover your niche
- Look at your weaknesses
 - Analyze business relationships that “didn’t work”
 - Network with others to fill in your gaps
- Decide where you want to specialize
 - Become an expert instead of a generalist
 - Analyze your best potential earning areas and how to capitalize on these

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Create Your Own Business Plan

- Build confidence in yourself with successes
- Know the law of supply and demand and adjust your rates accordingly
- Create quantifiable goals
- Set milestones and attain them
- Create framework for growth
- See “Building a Consulting Business Plan”

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Marketing – It Can Free!

- Word of mouth is the best way to build a business
- Teach local community college classes. Become a domain expert
- Write articles and submit to local and national newsletters or magazines
- Network with CPA's, lawyers, insurance agents, hardware specialists and others. Utilize referrals
- Create your own company fact sheet to leave with clients

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The ShinerGroup
Leslie C. Shiner
33 Plaza Drive, Mill Valley, CA 94941
E-mail: L_Shiner@ShinerGroup.com

Phone (415) 383-6255 Fax (415) 383-6285

 **The ShinerGroup Services** 
Specific to the Custom Install Industry

- **Remote File Review and Assessment Report**

QuickBooks is an excellent tool for construction accounting and project management. But it must be set up and maintained correctly to provide the information needed to run a custom installation company efficiently.

This service provides an assessment of your QuickBooks data file. Included in this service is a 20 minute telephone assessment. You will then upload a backup of your file to a secure site. We will evaluate the data and create a printed assessment document for your review. This document will include recommendations for your company as well as best practices. The service is limited to a review of your file followed by a written assessment of findings and suggestions. No changes will be made to your file.

The assessment covers the relevant entries from the following list:

<input checked="" type="checkbox"/> Chart of Accounts setup	<input checked="" type="checkbox"/> Generation of Invoices
<input checked="" type="checkbox"/> Items list contents	<input checked="" type="checkbox"/> Handling of Customer Deposits
<input checked="" type="checkbox"/> Use of Class tracking	<input checked="" type="checkbox"/> Usefulness/completeness of various Job

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Marketing on a Small Budget

- Join industry organizations to network, learn, and grow
- Create a newsletter
 - Build your email list
 - Discuss seasonal issues
 - Discuss industry issues
 - Create 'White Papers'
- Manage your website
 - Include interesting tips and tricks
 - Create a referral coupon

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Finding New Clients

- Ask your clients for referrals
- Offer free small seminars to prove yourself
- Describe your business
 - Create custom reports
 - Create custom templates
 - Create standard Chart of Accounts or Item List for your industry

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Keep your Existing Clients

- Draw out the hidden revenue opportunities within your existing client base
 - Make the next appointment before you leave
 - Be there when your clients need you; learn to judge and handle emergencies
 - Ask yourself, "Is this client a good fit for any other services?" Don't leave until you are sure the answer is no
 - Communicate, communicate, communicate
 - Don't limit your contact to the Bookkeeper – communicate with the owner
 - Provide answers to the level of the client
 - Distinguish between the 'how' and the 'why' learner
 - Tease by showing unused features of the program

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Build Long-term Relationships

- **Let the client know what you will do, do it, then let client know what you did**
- Provide value. Quantify your results if you can
 - Example: Improved A/R collections
- Choose *long-term relationship building over short-term financial gain*
- Sell yourself, sell your services, and become invaluable to each client
- Admit mistakes and do what is needed to fix them
- Give discounts for work you don't feel provided value
 - But let the client know!

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Explore Additional Business

- Reconcile Payroll tax liability account
- When was last time checking account was reconciled? Are there any old items?
- Reconcile A/P to physical documentation
- Does the client need a push for earlier billings? Look at A/R and cash flow
- Expand your services
 - Internal controls
 - Part-time controller

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Commit to Becoming a Better Consultant

- Privacy matters: **Never mention other clients during a visit!**
- Test new features or try something new in the privacy of your office
- Know when you need to research to come back with better answers
- Learn from your mistakes
- Talk about your billing rates – clients are afraid to ask
- Keep good notes of each visit – keep a separate binder for each client
- Take Advanced Certification exams

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Become the Expert

- Know your program and your field - always learn more
- Be able to recognize whether you are challenged or over-your-head
- Ask for help
- Be willing to negotiate time to learn something new
- Be curious - ask "what-if"
 - Ask the unasked question
- Know you provide value
- Find a mentor. Be a mentor

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Are You a Sole Practitioner?

- How many billable hours must you work to earn the income you want?
- You do the math:
 - Gross revenue required
 - Less operating costs (analyze monthly charges carefully)
 - Net client revenue
 - Less 50% for taxes
 - Net “take home” pay
- Average billing rate per client

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Number of Clients?

- How many clients do you need in your client base to earn the income you need?
- You do the math:
 - What is the average monthly billable amount per client
- How far ahead are you booked?

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Should You Join a Firm?

- Analyze referral network vs. employee situation
- Do you prefer a salary?
- What are the other perks of the position?
- Did you consider other benefits?
 - Health and dental insurance
 - Vacation and sick pay
 - Bonuses and pay structure
 - Pay for training and education
 - Mentoring

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Should You Hire Someone?

- Explore partnering with other ProAdvisors
- Investigate a non-compete clause
- Determine a pay structure
 - Based on billable hours
 - Based on salary
- Industry standard – billing rate should be 3-4 time pay scale
- Track unbillable hours very carefully
- Track ability of employee to generate work

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Get a life!!!!


- Don't give away your time
- Fire the bad client
- Enjoy what you do! Do what you enjoy!

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Summary

- Discover your niche and network with others to build your specialty
- Learn how to expand your services
- Draw out the hidden revenue opportunities within your existing client base
- Analyze your best potential earning areas-and how to capitalize on these

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<p>FOR ACCOUNTANTS, BOOKKEEPERS QUICKBOOKS® & ACCOUNTING SOFTWARE CONSULTANTS</p>		
<p>Questions and Thank You</p> <p>Leslie C. Shiner, MBA <i>Owner/ Principal</i> The ShinerGroup</p> <p><i>Intuit QuickBooks Certified ProAdvisor Sage Software Certified Consultant</i></p> <p>L_Shiner@ShinerGroup.com (415) 383-6255 www.ShinerGroup.com</p> <p><small>© 2007 The Sleeter Group All Rights Reserved</small> <small>21</small></p>		

The ShinerGroup
 Leslie C. Shiner
 33 Plaza Drive, Mill Valley, CA 94941
 E-mail: Leslie@ShinerGroup.com

Phone (415) 383-6255

Fax (415) 383-6285

Building a Consulting Business Plan

Goals - Quantitative	6 Months	1 Year	5 Years
Clients			
Total client base			
Number of clients seen weekly			
Number of clients seen monthly			
Number of clients seen quarterly			

New Sales			
Number of proposals - per month			
Number of potential contacts - per month			

Marketing and networking			
Join an Association - When			
Number of current client communications			
Budget for marketing			
Number of ancillary business contacts			

Education			
Certification goals			
Number of management books to read			
Workshops to attend			
Webinars to attend			

Goals – Qualitative

Customers - Who are my primary customers?

Size of Business?

Number of Employees?

Specialization in what industry?

Goals for Percentage of Business

Maintaining existing client relationships?

New clients?

Goals for My Business

Where should I specialize?

What are my talents?

Bookkeeping
Accounting
Tax Preparation (or Tax Reconciliation)
Management consulting
Implementation and conversion
Training
Data repair and reconstruction
Troubleshooting
Specialties (POS, Fishbowl, etc)
Hardware and networking (IT)
Other?

What are my weaknesses?

Bookkeeping
Accounting
Tax Preparation (or Tax Reconciliation)
Management consulting
Implementation and conversion
Training
Data repair and reconstruction
Troubleshooting
Specialties (POS, Fishbowl, etc)
Hardware and networking (IT)
Other?

What do I plan to do about the weaknesses?

In the next 6 months
In the next year
In the next 5 years?

Strategic Plan

What must I learn in the next 3 months?
How will I learn this?
Who will I contact for referrals?
How can I evaluate each of my relationships with clients?
How do I plan to build more work with existing clients?

Important Reminders

Client expectations:
How did I set them?
Where did I go wrong?

Client communications:
How do I best communicate?
Where did I go wrong?