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March 30th, 2013

Convincing your clients to call on you throughout the year isn't always easy. Here's how to position yourself as a consultant rather than a tax-time accountant. - By Nina Hendy



Adopting a consultant role in your clients' businesses might require a rethink on how to market your accounting firm and charge for your services, but the benefits are well worth it.

And yet, despite these benefits, many accountants choose not to provide consulting services due to time constraints and the hang-ups many have over their ability to sell, says accountant and business coach Rhondalynn Korolak.

Accountants are uniquely positioned to provide advisory services, given their deep knowledge of their clients' businesses, which is more profitable and fulfilling work than basic compliance, says Korolak.

"Most accountants see themselves as poor sellers and marketers, but they have enormous value and potential to contribute and are trusted by their clients," she says. "They're often missing out on huge incremental revenue streams."

Use simple language

Making the transition to a consultant available to your clients throughout the year can be as simple as tweaking your approach, such as remembering to speak the language of a layperson, says Korolak.

Many business owners need help with the various aspects of running a business. "But they're reluctant to call their accountant because they simply don't understand what the accountant says to them," she says.

"Accountants often produce reams of reports instead of speaking to each business owner about the two things that would make the biggest impact on their business and explaining why this is the case."

The best marketer wins

Another great way to get ahead is to establish a regular pattern of contact with existing clients, says Queensland-based social media marketing expert Natalie Alaimo. "Every day, we see so much information online, so if we don't stay top of mind and continue to build relationships, people will forget about us," she says. "It's not the best person in business; it's the best marketer who wins."

Jodie Sangster, CEO of the Association for Data-driven Marketing and Advertising, agrees that regular contact with clients is important but warns that marketing and communications have changed in recent years. Make sure you consider how your customers would like to communicate with you, she says.

"If you have customers in the older demographic, you may find they are less likely to want to communicate through social media and more likely to respond to mail," says Sangster. "If this is the case

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communicate through social media and more likely to respond to mail, says Sangster. If this is the case, then such channels should be used as your preference.⁷

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