

Accounting Firm Growth Specialists

Are Your Professionals Able and
Involved in Selling?



the
VISIONARY
group

Helping Firms Rethink How They Grow!

Organic and M&A Growth

Our team helps firms identify the GAP from where a firm is today and where they want to be. Then we set steps to close the GAP and work with your professionals to make them more comfortable and skilled selling and creating relationships. Visionary starts the lead process for you through our executive calling and custom email services to CEOs and CFOs. We work with in-house marketing leadership or take 100% responsibility for the development and execution of your growth plan.

Changing How You Are Perceived

Others will stereotype you as to what their opinion of what a CPA or accountant does. We want you to control how you are perceived so you are seen as an advisor who delivers audit, tax and accounting solutions.

Niches

We help you identify who to target and how to approach the process. Our business development services support efforts in areas including:

- For-Profit Businesses
- Non-Profit Organizations
- Audits & Reviews
- EBP Audits
- Taxation Needs
- Managed Accounting
- Fraud & Forensics
- Valuations
- Exit & Succession
- Cash Operations

Creating Offers & Specialty Services

The Visionary Group has established, door-opening offers to help firms attract referral partners, open doors with prospects and use in client mining or outreach efforts.

- Tax, Fraud & EBP Diagnostics
- Goal Setting & Operations Workshop
- Cash Operations
- Exit, Transition & Succession Planning

“Smart” Services

This approach combines email and calling. Our team builds a list of prospects or referral sources and creates a bi-monthly series of email blasts. We then call recipients that open the emails.

Fee Structure

We charge a fixed monthly retainer for clients that use us their outsourced Marketing and/or Business Development Director and have set fees for projects.



DEVELOP
PROACTIVE
STRATEGIES

OPPORTUNITY DEVELOPERS

**Sustainable
& Realistic
Strategies
& Execution**



What Impacts the Selling Process?

Understanding what stage of the Lifecycle the client or prospect is in and understanding their goals and pain points, their gap, is essential to selling.

Other items impacting results include:

Who you are targeting. Your website reflects your image which can prevent a prospect from taking the next step. The level of awareness of your firm in the marketplace. Prior experience with other marketing or sales professionals. Your comfort level with selling and prospecting.

We can help you refine any of these issues and other steps in the process.

Our 4 Corners Approach

1st Corner – Accounting firm searches:

We have a unique method of finding practices seeking a succession plan or looking to become part of a growing firm. We find firms not up for sale yet and know how to prequalify the financial fit, as well as their potential for a source of new talent or services.

2nd Corner – Existing client mining/outreach:

Most clients are not aware of other services they may need. We help identify which clients to target, how to educate them and potentially sell additional services. In addition, we introduce new services for a firm to suggest to clients. Visionary has additional services for firms to add an infusion of new ideas to help fill slower revenue periods.

3rd Corner – Referral partner network development:

Visionary manages a program of repeated communications to bankers, lawyers or other key professionals for your firm. Touching ones you have relationships with and introducing and sharing knowledge with potential new referral sources. We create and email service oriented messages and then utilize our “smart calling” to open doors and start conversations.

4th Corner – Direct prospect targeting:

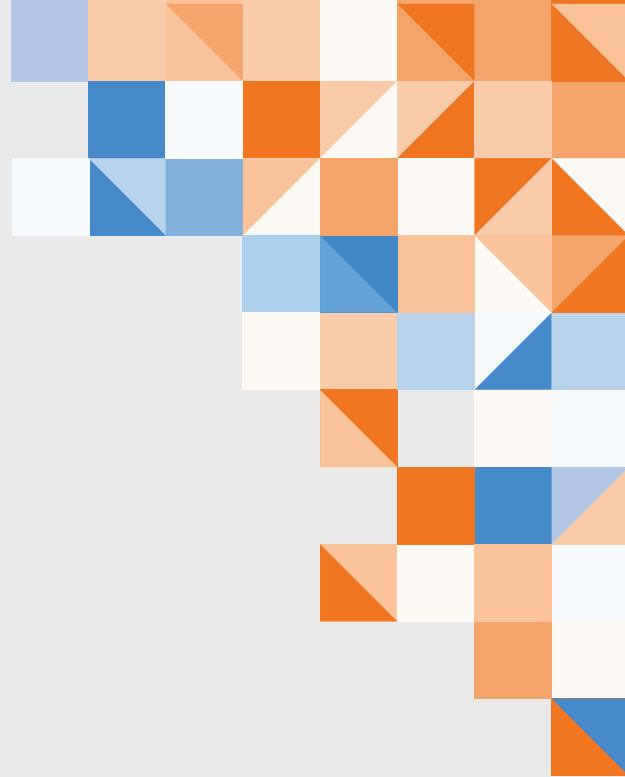
We nurture or implement project focused pursuit of the best fit prospects you want to add to your firm. Our professionals design the sales strategy, get your buy-in, and start initial prospect conversations. We hand off leads to your team, help throughout the sales cycle and adapt the process when refinements are needed.

Underneath it all is a Sales Foundation

Selling skills; individual and small group coaching and general firm wide sales training. Specific plans for specific industry or services niches; i.e. audit, tax, nonprofits, real estate, managed accounting, fraud, etc.



How To Start



the
VISIONARY
group

HELPING FIRMS RETHINK HOW THEY GROW THEIR PRACTICE!



800.995.9186



www.ThinkVisionary.com