

Build Your Practice!

Three Steps to Finding More Clients Without Spending a Dime!

Eric L. Green, Esq. & Michelle Weinstein



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Eric Green, Esq.

- ▶ Managing partner in Green & Sklarz LLC, a boutique tax firm with offices in Connecticut and New York.
- ▶ Focus is civil and criminal taxpayer representation before the Department of Justice Tax Division, Internal Revenue Service and state Departments of Revenue Services.
- ▶ Has served as a columnist for CCH's Journal of Practice & Procedure.
- ▶ Attorney Green is the past Chair of the Executive Committee of the Connecticut Bar Association's Tax Section.
- ▶ Eric is a Fellow of the American College of Tax Counsel ("ACTC").




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Eric Green, Esq.



- ▶ Eric is the host of the weekly Tax Rep Network Podcast, available in iTunes, Apple Podcasts and Google Podcasts
- ▶ Eric is the founder of Tax Rep Network, an online community designed to help tax professionals build their IRS Representation Practice
- ▶ He is the author of the Accountant's Guide to IRS Collection and the Accountant's Guide to Resolving Tax Issues




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CPE

- ▶ 4 Attendance Check Words
- ▶ Write them down (download the word document)
- ▶ Look for an email with link
- ▶ Complete your info and the 4 attendance check words
- ▶ Certificate will be emailed to you

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The Stats...

Year	Accounts in Collection
2005	6,478,000
2006	7,074,000
2007	8,240,000
2008	9,232,000
2009	9,667,000
2010	10,391,000
2011	10,809,000
2012	11,464,000
2013	11,721,000
2014	12,410,000
2015	13,371,000
2016	14,005,000
2017	14,080,000
2018	13,186,000
2019	15,002,000

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Non-Filers



More than 10 million



IRS announcing a new initiative to go after them

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Government will know about more!

IRS

Hint:
Listen to this week's Tax Rep Network Podcast with Kristina O'Connell!

Tools to help people get their Economic Impact Payment

COVID Tax Tip 2020-48, April 30, 2020

The IRS has two tools to help millions of taxpayers with their Economic Impact Payment. The payments are \$1,200 per eligible person and up to \$500 for each qualifying child.

The first tool, Non-Filers: Enter Payment Info Here is available - in English and Spanish - for certain taxpayers who don't normally need to file a return. This free tool allows them to enter basic information so the IRS can issue their payment. The second tool, Get My Payment allows people to check the status of their payment and provide bank account information if a payment has not been scheduled for delivery.

Who needs to use Non-Filers: Enter Payment Info Here?

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One-Third Of Americans Can't Pay

TAX AUDIT

HOME
| INDIVIDUAL INCOME TAXES

A Third of Americans Say They Can't Pay Their Taxes This Year Due to Covid

With record high unemployment, the TaxAudit survey shows the burden faced by taxpayers due to the crisis, with many making the difficult choice to drain savings accounts and miss mortgage payments, property tax payments, and even some monthly bills just

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Who Are We?

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Do you feel like...

- You're constantly stressed about where your next client will come from?
- You have to spend a ton of time and/or money to get clients knocking on your door?
- You don't know how to attract the clients you actually want to work with, and end up taking on anyone that walks through your door?

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GETTING MORE CLIENTS DOESN'T HAVE TO BE SO MUCH WORK!

If you set yourself up correctly, your ideal clients will be able to find you easily and know they want to work with you before they even reach out.

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Step #1:
Get on Yelp for Business
&
Google for Business

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If YOU were looking for a professional in your area, where would you go?

Google yelp

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TRY IT!



Do a search online for any of these in your area and see what you find:

- Tax Professionals / CPAs
- IRS/ Tax Issue Experts
- Tax Resolution Specialists

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- A Yelp Business account is FREE and gives people testimonials straight from your current and past clients. This social proof is extremely valuable!
○ Side Note: You can copy and paste reviews from Yelp onto your website, LinkedIn, and Facebook business pages too! You can also ask happy clients to add their reviews on Google.
- Create a robust profile. People want to know about you. This is a place where your personality can shine!
- Be consistent - take time - every day, if you can - to answer questions and respond to reviews.

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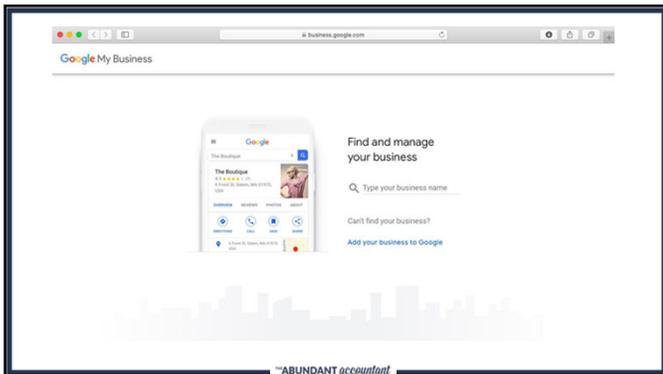
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- A free Business profile on Google lets you engage with customers directly and manage how your business appears on Google Search and Maps.
- Having a Google profile makes it simple and easy for clients to connect - by calling, messaging or leaving reviews.
- Easy to find and claim your business or add it as a new listing.
- It's great to track how people are finding and interacting with you.

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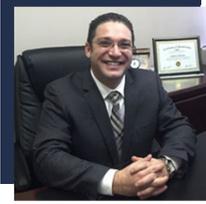
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Case Study: Meet Aleksey



When Aleksey started his business, he knew exactly who he wanted to reach. However, he had zero clients. He also didn't have a lot of money.

When Aleksey searched for similar tax professionals near him, he found a lot of them on Google. What he *didn't* find was anyone on Yelp.

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Case Study: Meet Aleksey



He began using Yelp to help people find him when they were searching for someone of his expertise. By offering value, he was able to assist people with their basic needs and then upsell them on his company's services.

Aleksey eventually leveraged an ad spend and tripled his ad investment in the first year and did 10x the second year.

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Step #2: Ask for Referrals

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REFERRAL CLIENTS ARE THE BEST CLIENTS!

- When you ask your current happy clients for a referral, you don't need to spend any money.
- People are more likely to buy from people they know, like, and trust.
- Referrals from current, happy clients also increases the conversion rates, that the referral will choose to enroll with you!

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Don't Forget to Qualify



Not every single lead or referral will be a quality lead for you. If they're not a good lead for you, you can always refer them out to someone else who might be able to help them.

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Be Clear When Asking



It's our job to make sure we are as specific as possible with who we truly want to work with.

Example: I want to work with...
accounting professionals who offer a higher-level service, and have been in business for two years.

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How Do You Get Referrals?

#1 way: By Being Sincere and Direct!



- Ask only if and when you know the client is satisfied and has reached their desired result working with you.
- People love to help other people, especially if you've helped them.
- If you don't ask, the answer is always NO! Think about the people who need your help and the money you're leaving on the table by not asking.

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How Do You Get Referrals?

#2 way: Use an Incentive Program

- Provide a financial incentive for every good referral that is a great lead and ends up enrolling with you.
- Offer non-financial incentives like gift cards or a favorite bottle of wine (or if you're not sure of any of these things, JUST ASK your client what they would love!)
- One important note: There are regulations in each industry as to what you are allowed to give and your clients are allowed to receive. Make sure NO ONE gets in any trouble 😊

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How Do You Get Referrals?

#3 way: Make it EASY to refer people to you.

- Have templates and canned responses you can offer your current clients to make it easy
- Always have business cards on hand at networking events or when meeting someone in person (This is for after the COVID Days)
- Don't create any work or stress for the other person. Do all the work for them!

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Here's an example: Case Study

A past student of mine, John, sent me an email to let me know he was in a room with over 100 CPAs who he felt were in need of my sales class to help build their confidence in their sales conversations. I had an email stored in my "canned responses" folder that I quickly forwarded off to John.

Within about 30 seconds John had all of the information he needed to start sending me referrals for my 8-week Sales Mastery Training for accounting professionals. I made it super simple for myself and for John to refer people to me.

From his 1 email, I had people booking calls that wanted to talk to me!

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How Do You Get Referrals?

#4 Way: Stay Top of Mind and Follow Up!



- By staying top of mind, people are more likely to refer you out when a colleague comes to them looking for help with their accounting needs
- Schedule reminders in your calendar to reach out to current clients
- Consistent follow-up = consistent referrals!

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How Do You Get Referrals?

#5 Way: Give More Referrals



- The hub-and-spoke model: think of yourself as the hub, and colleagues specializing in other areas are the spokes
- When someone doesn't qualify as a client, you should always refer them to someone!
- Give out referrals without asking for anything in return - it WILL come back to you 10x

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Step #3:
Have a Sales System in Place

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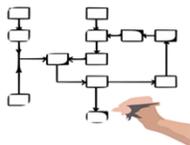
**“Winging it” is costing you time, money,
and stress and is losing potential clients**



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**A sales system is a set of repeatable steps
that you use to take a potential client
from first contact to a new client**



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A step-by-step sales process will streamline your business and take the guesswork out of getting ideal clients, increasing conversions and making more money.

Without a sales system in place, you will end up overworked, underpaid, and burnt out!

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Meet David, who finally implemented a sales system and got amazing results!



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IMAGINE...



- No more taking on clients just because you need the money
- No more working yourself to death for less than you're worth & not being appreciated
- No more winging your sales conversations or dreading whenever someone asks how much you charge

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Let's Explore What's Possible!

If you're ready to create and implement a sales system in your firm, I invite you to apply to our online 8-week Sales Mastery Training & booking a call

Go to www.theabundantcall.com to book your Complimentary Strategy Session Today!

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Check Out from Tax Rep

▶ Go and Check Out:

8 Money-Making Tips to Build and Grow Your Tax Representation Practice

▶ Absolutely Free

▶ <https://taxreplc.com/8-money-making-tips/>

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Saving Taxpayers 39

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