



THE PREMIER SERVICE

A TRIED AND TESTED METHOD OF GENERATING
HIGH QUALITY APPOINTMENTS
AND NEW BUSINESS FOR
ACCOUNTANCY FIRMS
WITH VISION

A close-up photograph of a person's hand, palm facing forward, with the index finger pointing towards a circular button. The button has the word 'START' written on it in a bold, sans-serif font. The background is a blurred office setting with a person in a white shirt.

START

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This is to confirm that over the last four years we have used Insight Marketing to provide a consultant four days per month. This process has generated literally hundreds of appointments and has led to new business opportunities that otherwise would not have been open to us. At all times, Insight has been professional in their approach to us and listened to our specific needs. We are happy to recommend their services.

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–Demacks Chartered Accountants and Registered Auditors



Some firms are bunkering down, reducing costs and looking internally while others are still out playing on the green and hoping for great year of practice growth!

The last few years have been fairly stable and, in truth, relatively pain-free for most accountancy firms and their clients. Many firms have naturally specialised in growth markets such as property development, construction and building. And with almost all clients enjoying great market growth, firms have been able to offer them additional added value services, tax shelters, wealth management schemes and even property investment opportunities, all of which have enabled many firms to make record profits. Perhaps the biggest problem firms have had to face until recently has been recruitment of good quality staff.

But today...? It's incredible how times have changed -and just how quickly! It's impossible to assess the full effect right now as many are predicting "the worst is still to come". What is clear is that many firms are simply getting into their bunkers, reducing their cost base, and digging in. Yet this introspective analysis of expenses can result in significant damage. Take a national firm we met with just 2 weeks ago. Each office had been instructed to cut costs and reduce unnecessary spend. In one office this resulted in the admin clerk being removed along with the tea lady! Sadly, when they left somehow they took with them the joy of work and once high levels of motivation for that firm. Some of the partners wanted to leave and one of the senior partners told us -with pain in his face, "This has been one of the unhappiest months of my working life. What is worse is that this internal focus has resulted in us taking our eye off the ball externally. Our previous targets have all but been forgotten and the results are now being felt. Losing significant numbers of clients and going from strong growth to negative growth, has hugely dented our margins."

We have also witnessed a significant change in customers wanting to change firms. They are desperate for help, proactive advice and guidance, yet they cannot get it from accountancy firms more concerned with their own internal costs and how they can protect themselves. It's not surprising then that right now is one of the best times for a firm to be actively marketing. 12 months ago it was difficult to find a reason to entice a customer away from his current accountancy practice. Now, for proactive firms, it's a case of finding the profitable ones who want and need more!

For well over 20 years, Insight has helped accountancy firms achieve exactly this by planning, creating and implementing highly effective practice-growth strategies -and have hundreds of testimonials from firm's right across the UK to prove it.

Warm regards

A handwritten signature in blue ink that reads "Carly Payne". The signature is fluid and cursive.

Carly Payne
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1 : “WITHOUT A GOAL TO WORK TOWARDS WE WILL NOT GET THERE”

Many accountancy firms simply rely on word of mouth and referrals to generate new business. Whilst these are an excellent source of new business they can fluctuate in volume and are not a reliable source that you can base business growth upon.

With this in mind many accountancy firms and financial service companies take advantage of the Premier Service offered by Insight, specialists in generating new business for accountants nationwide.

Stage 1.

“Without a goal to work towards we will not get there”

We are not a call centre or telemarketing agency/bureau. We specialise in selling for accountancy firms using highly trained staff. Your designated specialist will know your industry and your firm, its ethos and selling points. It is our experience that the services provided by an accountant are different from literally any other professional service company. Clients do not change their accountant on a whim and its never in our experience down to price.

Because of that we never use scripts. Every call is different, and we expect to sell for your firm with confidence and knowledge, professionally uncovering the true needs or requirements of each prospect. The selling points of your firm are then matched with that prospect.

To enable us to work in this manner, the first stage of your project is a briefing session or Practice Development Session (PDS), conducted at your office. This session is absolutely essential to your campaign, ensuring the right foundation is laid and the knowledge needed to sell for your firm is gained.

During this session we will carefully look at all the relevant facts of your history and get a full understanding of how your firm operates. We gain insight into what makes you different, enabling us to work alongside you with confidence and appropriate knowledge. When identifying new opportunities on your behalf, it will give us the information we need to professionally uncover your true needs and requirements.

We look at your business objectives and company ethos, placing specific emphasis on the need to generate sales. We determine together what level of activity is required, and define the strategy and selling points needed to achieve your goals and over what timeframe.

It is likely that while you will take on a variety of clients, you may prefer to work with proactive companies that can benefit from added value services you can offer. During your PDS we will profile your ideal client and adapt this as your campaign progresses. It is this information that will assist when setting the appointment criteria. We will also discuss and select the necessary data that will be used to work from. This data will fit your defined criteria and will be maintained and updated for you but you will own it. It can be used for other sales and marketing functions such as emailing, mail shots, SMS marketing and digital marketing should this be part of your overall strategy.

A practice development session typically lasts between 3-4 hours together face to face and a further 10-12 hours of our time to carry out pre development preparation and post development administration. In some circumstances further time together may be required; this will become evident during the first session together. During your practice development we will look at the following areas:

The cost for this unique PDS focused on your firm and its growth is just £950 + Vat. At the end of the session together we will have a thorough understanding of your firm, its history, selling points and goals and we are ready to start your campaign. You will have a clear understanding of the format for your campaign, the time frames the work involved and the investment required. You will also receive a carefully designed start up folder that takes you through the service step by step to ensure that every area is covered in detail. To book this high value session call 0800 8030826 or email carlyp@insight-marketing.com

1 : “WITHOUT A GOAL TO WORK TOWARDS WE WILL NOT GET THERE”

Laying the right foundation from the start

Your firm's business

- Your company structure
- The current sales process
- Markets you are currently involved in
- Potential competition
- Previous marketing activity
- Current marketing activity
- Current sales strategy to include contact management, measurement of prospecting process, capacity
- Growth required/desired
- Potential and ability or resources for growth
- Schedule and strategy to achieve this growth
- Agree test/pilot sales and marketing campaign in line with the objectives discussed
- Your current digital marketing activity
- Integration of your digital marketing into the fabric of your business



2 : “WHERE COMMUNICATION FAILS IMAGINATION TAKES OVER”

With the right foundation laid, and databases selected, we can begin to call and market for your practice at the agreed frequency. Contact will be made, sales letters and information sent out, and a follow up process implemented. The total responsibility for new contacts, follow up and final appointment generation will be ours. This leaves your team free to make the visit and sell your services – generating new business at a controllable rate.

We believe in accountability and for that reason we insist that for every day worked you receive a full update, within 1 hour of your session ending. This will have all the relevant details of the day’s activities, including a summary from the specialist. This will include information on appointments generated, and notes on hot or warm prospects gained from that session.

You will also receive a full activity report. We send this because we believe in total transparency and want to ensure that you see everything done for you. Your full activity report logs every call that has been made, the time of the call, and notes from each conversation. This substantial document will give you precise information about numbers of decision makers reached, and how many calls of various kinds are being made.

3 : THE MATHS OF SELLING

“The Maths of Selling is a tailored marketing tool for accountants that works and provides an instant and reliable ROI calculation for sales investment”

From your concise daily updates we develop the maths of selling for your firm. This will tell you on average how many calls it takes to get through to one decision – maker, how many decision – makers to each appointment, and how many appointments are required to secure each new client.

As a result, you can monitor the cost incurred per client, and ensure that the maths are working for you. In addition we constantly monitor the level of weekly activity required to ensure the optimum result for you.

4 : “ONGOING REVIEWS”

Once your campaign is up and running it is not just left that way. At agreed dates – normally quarterly - we will have a joint review, from which a mathematical model of future success is calculated. This becomes the basis of our ongoing work together.

WHAT ARE THE BENEFITS?

Your business may not have the time, inclination, ability or resource to contact enough of the right people – at the right time on the right day

Results, Results, Results.

Our team has worked for hundreds of firms over the last 20 years generating significant levels of new business.

No more cold calling or sales worries. Just visit on pre-qualified appointments. You optimise your time and you get to do what you are best at.

You have **all the selling activity you need, when you need it**, and exactly when you want it.

You have a highly successful and experienced sales team available to get you genuine new business.

You will have a customised database for all your company’s ongoing marketing. You will own it and it will be highly pre-qualified.

All this is available at a fraction of the real cost of employing a full-time team and without that risk.

You also have the option of building towards an ethical exit strategy

We are confident this service will work for you, to arrange your PDS, or to discuss your requirements in more detail please call us on: 0800 8030826

YOUR TELE-SALES SPECIALIST

Each Telesales specialist has undergone intensive training regardless of the amount of past sales experience. Their training is also continued through quarterly sales and marketing seminars, keeping them up to date with new techniques and methods. With a company background in sales and marketing training established worldwide over the last 20 years many of these new techniques are pioneered by our teams.

This means that you can be sure you are getting a trained individual who knows exactly how to get past the secretary or PA and through to the decision maker. At this point they carry out the call without the use of a script, representing your company in the most professional and productive manner. Their role is to generate pre-qualified appointments or leads in line with the criteria set during our briefing session. They are highly experienced on the telephone and have been handpicked for their sales skills. Each individual will achieve on average 100 – 120 telephone calls per day.

Of course we would all love to sign up a new client for every appointment we undertake. Unfortunately life is not quite like that! We understand and for that reason, all the necessary follow up from an appointment, can be handled by your Telesales specialists to ensure that no extra time pressure is put on you as a result of your campaign.

Your Telesales specialists will (if required) contact you at the start and end of the day to gain feedback and to chat through the results of each day. The cost for this service is just £450+ Vat per day and this low cost investment will remove from you all the pressure to generate appointments and leads, leaving your team free to carry out appointments with companies that have a need for your service or products. In short, new business of the right kind for your firm.



BUT DOES IT WORK?

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Insight have been honest and down to earth throughout our relationship. They have managed our expectations well. This has meant that what they said would happen – has. Following our pilot campaign we have made a good return on our investment and are now continuing to use Insight for both our high level appointment generation and our digital marketing. We are very happy knowing we have the experience of Insight on tap and look forward to another year of growth.

”

– Farook Owadally



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We have used Insight for over 3 years to assist with our practice growth and new business generation. Over this time they have delivered great results, helped us win some cherished customers and help us focus our sales and marketing efforts. Their focus on quality means we take new opportunities they create very seriously and they are a great use of our senior teams time. We have no hesitation in recommending their services.

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– Nyall Jacobs



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I have enjoyed working with Insight as a company and with Joel very much. Their input has been appreciated over the last period and the focus that they gave me and our practice was a part of the large expansion we have achieved, in conclusion then, I have had good value from their services.

”

– Gerrard Price



BUT DOES IT WORK?

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Both our representatives have been prompt with feedback and achieved well in excess of the success rate we were promised. I am extremely pleased with the overall quality of work that Insight has provided our firm over the last 5 years. They have helped with our expansion and directly generated us high quality introductions that have resulted in a direct return on investment. I look forward to continuing to develop our association with Insight...

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- Thoburn and Chapman Chartered Accountants

Thoburn & Chapman

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I have been really impressed with Insight and their turnaround time, we marketed by email for our event with relatively short notice and the team at Insight produced the information, sent it out and followed it up, all within a tight time scale and produced us some great results, capturing really useful data along the way. I would be happy to recommend the services of Insight.

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- Roy Lyness

peak performance >

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We have used Insight over the last year to carry out direct marketing and lead follow up for a selection of our firms. The service we have received has been very professional and has resulted in some good leads being generated. I would be happy to recommend the Insight..

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- Steve Pipe



BUT DOES IT WORK?

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Formerly with Ernst and Young and now having many accountancy clients myself I am very careful who I recommend. I wholeheartedly recommend Insight and their workshops to my customers and other firms looking to grow.

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- Carol McLachlan



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This is to confirm that over the last five years Insight Marketing has conducted numerous consultancy assignments directly for us and for scores of our clients; generating for us and our clients significant volumes of business. They are professional in their working methods and reliable with their monthly activity reports. . . .

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- Nick Robinson



“

We have used Insight Marketing to write for our publication - Taxation Magazine. We have found them knowledgeable and reliable..

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- Richard Curtis





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