



A 5 Step Plan for Accountants to Create New Growth Opportunities

5 simple but effective things busy accountants can do every day to create significant new career opportunities, greater influence, a better network and new business conversations.

Written by Rob Brown

*In association with Martin Bissett and
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Who is this guide for?

This unique guide is for accounting professionals in practice who want (or need) to create more revenue and career opportunities. Like many accountants, you likely have a business development strategy, selling or work winning dimension to your role.

Beyond technical competence and commercial awareness, the ability to generate new revenues for your firm is what makes you wealthier, more promotable and more valuable to your employers. And you're about to learn five simple things that, done every day, will guarantee this happens.

Why did you want to be an accountant?

Bringing in clients and fresh business is kind of expected from most accountants in practice. Trouble is, it's likely not something you've been taught how to do. More than that, it's not something that comes naturally to technically strong professionals.

As a result, most accountants struggle to bring in the kind of work that gets them noticed or makes them promotable. If you're a partner, you're under pressure to show you're worth a seat at the table. If you're below partner level, you know that beyond technical competence, the passport to partnership is the ability to drive growth.

It's all quite depressing as it's not really why you signed up for a career in accounting. You're good with looking after clients and doing the numbers. You like some of the interesting projects and even advisory work. But winning work is a problem you don't need and a responsibility you don't really want.

So what to do?

The good news

Everything that follows is REALLY easy to implement and you can get started immediately. Like, right now immediately.

Business development or BD can be done in lots of ways. If you're spending nonchargeable time networking, writing articles, posting on social media, making cold calls or updating your swanky CRM... then your priorities are skewed. Those things work, but can be distractions if you don't know what to do or say to make them count. They also take a lot of effort to yield any kind of results.

Bottom line is, if winning work was easy, everyone would do it. And the truth is very few do it well.



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The good news is, just doing five simple things every day will make a huge impact on your career and your reputation. Don't be scared by the idea of making more of a sales effort. It leads to good things.

More business.

More kudos.

More revenue.

And it's actually not too much effort, either. In fact, you're about to learn how winning work requires much less effort than you ever imagined. It's certainly going to be much easier to live with than the alternative - cold calling, creating endless content, hanging out on social media and networking.

Do something different be a statistical anomaly

Statistically, you probably won't read all of this guide. Your bookshelves are packed with stuff you've never read. You've got lots of good stuff collecting digital dust on your hard drive. Podcasts you haven't listened to. Websites you've bookmarked and never revisited.

Why might this guide be any different?

First, it's short. Second, it's all doable. Third, you need it. Fourth, it's in your hand right now, so why not? Look, even if you do read this, it's likely you'll forget about it in ten minutes. Especially if you're currently reading this on your phone. Most people never put what they learn into action.

Not you, obviously.

But you see how most will download this to look at later. It will be a real shame if you're one of those statistics.

So do something different.

Read and apply.

Apply some effort and get some results.



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What you're about to read (if you read it) will drastically transform the fortunes of your business and your professional career.

So **please** be the exception to the rule.

Become a statistical anomaly.

Be an outlier that reads, then implements. Then let me know how you're getting on: drop me an email at rob@accountinginfluencer.com. But first, dive in right now. Your reading time for this guide is under 15 minutes ... and after that will only take you 20 minutes a day max to implement.

3 things you need to make this work

I'm assuming you are good at what you do. In addition, if this is going to work, you should also have...

- 1 A CRM system** (contact relationship management) or equivalent to schedule follow ups and reminders.
- 2 20 mins a day** for business and network development activity. Take the weekends off if you want.
- 3 An intention or motivation** to raise your profile, build your career and enhance your business opportunities.

If you've got all of these 3 things, then you've got all the prerequisites for success. All good? Let's get started.

We're focusing on the five things you need to do every day to open more doors and start more new business conversations in the next 30 days.



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Number One: Do three reachouts

This first thing is easy. You probably do it already, but from now on you'll do it in a deliberate, regular and consistent way. Start by drawing up a list of people that you should probably be keeping in touch with. Think existing clients, prospects, old leads, new leads, colleagues across other service lines, external professionals, networking contacts.

Add to that friends, family and people you met in the past and have been meaning to get in touch with ever since.

Add anybody else you think might be in some way, one day, directly or indirectly influential to your continued success.

Try to get 100 names. Write them down or add them to your CRM system. We'll call this your **TARGET LIST**.



Not knowing 100 people is impossible.

You should have close to 500+ on your LinkedIn profile. Add to that the stack of business cards you've collected from events in the past. Then how about your existing client portfolio? The good news is, you can add more people to the list as you go along.

All of these people could do to hear from you. You ought to be on (or back on) their radar. They need reminding you're still around. Still in business. Still active.

Once you've got the list in place, start with the first person and drop them a line. We're going to call this a 'reachout' okay?



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How to 'reachout'

When you reachout, say something like:

- 1 Hi, it's been a while since we caught up. How are things?
- 2 I was thinking about you recently. How are you doing?
- 3 You popped into my mind this week. How have you been?
- 4 Hi! It's my fault we haven't been in touch. Sorry about that. What's been happening with you?
- 5 Hi there. I'm reaching out to a few connections I've made in the past so I can be a bit better with my network. It would be good to reconnect. How are you doing?
- 6 Hi [name]. I was chatting to someone about you recently. It's been a long time - how are you doing?
- 7 You popped into my head today so I thought I'd get in touch. Fancy a catch up sometime?
- 8 Hi there - how's global domination going?

Email is great for this. LinkedIn is also good if you're on there. Or a text message. For bonus points, you can reach out with a hand-written note. A thank you card. You can even pick up the phone.

For double bonus points send them a gift. Something you know they'll appreciate. Doesn't need to be expensive. You know that fuzzy feeling you get when you open a birthday card or when you get a postcard from someone who's on vacation? How about when you get something in the post (that isn't a bill) out of the blue?

Great feeling, isn't it?

You can make other people feel like that every day by writing a card and putting it in the post. When you've done it, move their name to the bottom of your target list. Or tick 'done' on your CRM.



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How to follow up

Schedule a follow-up reminder to reachout to them again in 30 days. Your CRM does that. Do three reachouts each day. Repeat the process the next day.

You're building 'propinquity' which I'll talk about later. If you do this on a daily basis, then guess what? Within a very short time, you'll re-establish some meaningful relationships with people. These people will hopefully be pleased you reached out. They'll think and say good things about you. They'll support you in business and life. They may be open to your requests, ideas and plans. They might appreciate catching up, speaking on the phone, sharing what's been happening, talking about what's current. If they reply, you've started a conversation.

Aim to stay in touch with them once a month. This is a process, not a one-off touch.

If you can keep in regular contact with one person a day over the course of a month, that's 30 potential...

- ✓ key supporters
- ✓ introducers
- ✓ clients
- ✓ advocates
- ✓ champions
- ✓ investors
- ✓ friends
- ✓ connections

... that you can help, get help from and build a relationship with. People you can rely on. If you feel adventurous and want even bigger returns, make 2 or 3 reachouts a day.

You might get through your list of 100 in a month or two.



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Number Two: Share something valuable

Share something valuable with three contacts.

Regardless of whether people replied to your initial outreach, here's what's next. Pick three people on your target list and share something cool with them. Something interesting, intriguing, helpful, unexpected. Make it personal and individual. This is not a mass mail.

For instance, each morning, send an article or blog post to three people from the top of your list. Perhaps a nice quote, link, image, cartoon or motivational message. Include a message such as:

- 1 Hi [name] came across this and thought it might be worth a read for you
- 2 Not sure if this is of interest...
- 3 Not entirely sure if this is of any interest to you, but thought of you anyway...
- 4 Is this of any benefit to you?
- 5 Thinking about your challenge with X, perhaps this may be of use?
- 6 Because of your interest in X, you might like this piece of research?
- 7 Might this be of any relevance to you?
- 8 Wondered if this might be of use to you or any of your team?
- 9 Brilliant! What do you think?
- 10 Have you seen this?

Phrase it as a question so it prompts them to acknowledge. To source something good to share, read a newspaper or a few blogs. Trawl useful stuff on social media.



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To nudge things further, add something like:

- All OK with you?
- Fancy a coffee soon?
- How are you doing?
- Be good to catch up?
- Been a while hasn't it?
- You okay?
- It's been ages - we should reconnect

Look for book summaries, interesting graphics and images. Maybe recorded webinars or insightful special reports. Try research, stats, trends or facts.

It might be written by you or someone in your firm. It might be an external source. Once you find something noteworthy, share it with relevant people. You can send the same thing to different people if it fits. Just get organised so you don't send the same thing to the same person more than once!

You've probably already got a few websites and content sources that you like, so start there.

Ask your colleagues and contacts where they get useful information and insights from. I get lots of good stuff from LinkedIn, and use their search bar to uncover good topics.

Keep a folder or repository of good links, sources and goodies for this action. Just make sure you send this personally by email or some other direct message. One person at a time.

It doesn't have to be business or work related. If you know people's hobbies or personal interests, send something personally appropriate. All the time, you're starting conversations. By sending targeted, non-promotional information to people who may find it relevant, you're doing two things.

Firstly, you're eliminating the dreadful "I really should get back in touch with her but I'm not sure what to say" conundrum that leads to relationships dying slow and awkward deaths.

Secondly, you're actually getting in touch again. This is important because people buy from people they know and can remember.



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It's your responsibility to not be forgotten. You want people to keep you in mind when openings or opportunities come up. To do that, you need to give them a reason to recall you and connect you to their everyday activities and conversations.

Exist more

Get back onto or stay on their radars. Let them know you're around and you're open to talking. And when they reply, you reply back. Do it every day. Share something with three different people.

Don't worry about replies or thank yous. The point is simply to connect, not to impress the world with your wide-reading and breadth of knowledge.

Number Three: Make an introduction

Make an introduction for one person.

This one takes a little more time and thought. Your aim is to introduce one person to another person every day. And the best way to get that opportunity is to create it. That means keeping your eyes and ears open to the chance of making connections. When you meet new people or even people you already know, ask yourself:

- ❓ Who can I introduce them to?
- ❓ Who might they get along with?
- ❓ Who might they have some synergy with?
- ❓ Who might make a good customer, client or contact for them?
- ❓ Who or where can I signpost them to?
- ❓ Do I have anyone in my network who might like to speak with them?
- ❓ Can I research a little and find somebody good to introduce them to?



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Then craft a simple email or message with a subject line of 'Useful Introduction?' or similar, with an opening along the lines of:



Then a quick line about how they might be relevant to each other. This context personalises things and gives them a starting point for a conversation:



"As you're both in [sector, industry, area, speciality etc] I thought you might have a few things to talk about. Your move.. "

"As you're both interested in [hobby, passion, subject, area of expertise, target market, product, service, app, technology] you might like to pick each other's brains. Over to both of you."

"Since you're both [area of commonality, shared interest, collaborative possibility], it's time I introduced you. I'll leave you both to take it from here."





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Then set the expectations to take the pressure off **you** and off **them**:

Then a quick line about how they might be relevant to each other. This context personalises things and gives them a starting point for a conversation:



"If you get along or can help each other out, then that's great. If not, no worries. No obligations!"

"No worries if it's not a fit - it's always good to bring two interesting people together whatever happens."

"If there's any way you can help each other or work together, go for it. Otherwise, no expectations.."



And that's it. When you can connect people, you add ENORMOUS value to your network and you become the common point of contact. Which means they'll talk about you.

And this is good.

When you become this hub or signposter, you become noticed and valuable. You're giving first. You're starting conversations either with yourself or with you in the middle.

This is also good.

You don't have to be an extrovert to be a social connector. You just have to be diligent, creative, open and intentional.

Secondly, you're actually getting in touch again.

This is important because people buy from people they know and can remember.





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Number Four: Talk to one stranger

This might be scary for some people, but it strengthens your conversational muscles! Choose someone you want to get to know and then let them know that **you** exist.

Every day, start a conversation with a person you don't know. Somebody who doesn't know yet that you exist. Choose somebody you admire or find interesting or see potential with. Then make them **know** that you're real. You're going to have a start a second list for this one. These people may need some tracking down as they're unlikely to be in your network. Do this properly and in time, they will be.

So draw up your list of strangers. Aim to put at least 20 names on this list.



So draw up your list of strangers. Aim to put at least 20 names on this list. Be tactical in choosing your strangers. Identify people who you can help in the future, or who are well placed to help you today. You don't even have to know their names right now.

Perhaps start with a job title or role. Or some influential people you'd like to get to know. Or some potential business clients you'd like to be working with.

But what do you say to somebody you've never met?

Start with the reason you put them on the list: you admire them or find them/what they do interesting.

Start with a compliment.

Be genuine but not over the top.



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Then ask a question that requires a very brief answer:



"Would you be open to a quick chat to explore a couple of ideas?"

"Are you open-minded to jump on a quick call to see if we could help each other?"

"Might a brief phone chat to talk about X help us decide whether it's worth meeting up?"



This gives them an opportunity to get back to you with a short answer that doesn't require too much thought on their part. People are generally good (and people are generally self-interested). They might also be curious, intrigued or even flattered.

For those reasons, as long as you don't come across as the kind of weirdo they would cross the street to avoid, you'll force an answer out of sheer courtesy. Before you hit send, have a quick look over your email to check for typos. First impressions count.

Then sign off with:

- Thanks!
- Thanks for considering.
- Appreciate your thoughts?
- What do you think?
- Any possibilities here?

When you make a concerted effort to add one person to your network each working day, that's 200+ new and interesting people brought into your life in just one year. Plus you've callously hand-selected these people to be useful to you one day. That's smart, directed networking and clever outreach. Something most people won't even think of doing.



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Do you know 200 influential people at the moment and do they know you?



Do you know 200 influential people at the moment? And more importantly, do they know you?

Be careful not to just send one email and then forget about it. Start a conversation with these people, especially if they go to the trouble of replying.

Aim to send a follow up just in case they didn't see the message or got too busy. You're being polite, not a pest. They're not going to be your new best friend overnight, but you should be staying in touch with them at least once a month.

Number Five: Make a new business offer

This is the most courageous thing of the five things I'm asking you to do. It will be the major differentiator to your bottom line in the next 30 days and beyond.



You MUST be able to answer the daily question:

"Have I asked somebody to buy something today?"

with a firm YES.

It doesn't mean you've necessarily made a sale, but it does mean that you've created the opportunity for one to happen. You've placed another prospect into your pipeline.



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If you're already booked solid and you're saying "I don't have the time or bandwidth to deliver anything more", it's pointless trying to sell something you can't deliver then you've got no business doing this outreach.

You're just going to stress yourself out and let others down. But you can't progress any further. You're okay for now but you're not building for the future. You have a job, not a career. And you've just hit your income and promotion ceiling.

I'm reluctant to mention the word 'sales' to an accounting professional, but in reading this, you already know how important it is for you to create new revenue opportunities.

Yet if you make no new business offers, don't be surprised if you don't create any new revenue opportunities. Or that your referrals dry up. Or that your prospect pipeline is anaemic.



You're taking some element of control over your career and new revenue options. You're toning up your business development and mental resilience muscles.

So what do I mean by a '**new business offer**'? This needs a bit more coaching and it's where I help accountants position, price, negotiate, convert and close new business.

I'm not covering that in this brief guide. But you at least know the final step. Making some kind of offer or suggestion is what makes all of this count.

Your outreach earns you the right to build a relationship. To get yourself known and trusted. To open up sales opportunities.

If you need more help with this, drop me a line. To recap, when you're organised, motivated and intentional, you'll have a simple system that you can apply each day to put more people to work for you.



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In Summary: Create new opportunities

So to recap, your checklist is simple if you want to create significant new career options and new business opportunities in the next 30 days:

- 1 Create a networking list of 100 people to keep in touch with. Reach out to three each day by whatever means you can.
- 2 Cultivate a daily practice to add value by sharing some knowledge or other valuable stuff with 3 people a day.
- 3 Develop the intentionality to see the synergy between people and make regular introductions. One a day is good.
- 4 Build a 'hit list' or target list of 20+ strangers you want to get to know better. Approach to start a conversation or relationship. One a day is all you need.
- 5 Give people an opportunity to buy something from you or do business with you. Make some kind of offer or invitation to one person a day.

If you'd like some help with this or even some accountability to get it done, find me on LinkedIn and reach out. You know how to do that, right?

Finally, don't be moaning that this doesn't work. There are no guarantees of huge business opportunities but you can see the logic.

Get to it and good luck!

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