

## Maximize your firm's sales potential

Performing sales activities does not come naturally to everyone. Your firm may have one or two partners who excel as salespeople, but chances are you have many more employees who feel uncomfortable just at the thought.

Sales can be intimidating, especially for those in the firm that don't consider themselves part of the sales force. But with the right training and support your partners and staff will produce results.



### Everyone Plays a Role in Growth

In many firms, sales and business development activities are thought to be duties of partners alone. Staff members rarely learn about growth until they reach the ranks of upper management. Institute sales training and expectations at every level in the firm – then, as roles evolve, so do sales skills. You will also be preparing staff to become effective future partners.

### Different Levels, Different Duties

Organizational levels and experience determine an individual's contribution to growth. Obviously, part of a partner's role is to actively seek new business. But what about a second or third year staff accountant?

- **Responsibilities for Staff:** Much of a staff accountant's time is spent on client service. They contribute to growth by increasing client retention. Providing outstanding client service helps retention and opens the door for offering additional services.

- **Role for Supervisors:** Supervisors begin to gain knowledge and confidence in all the firm's services. They feel comfortable meeting with client personnel and identifying and discussing client needs. Supervisors also are able to prepare and deliver effective management letters.
- **Role for Managers/Senior Managers:** Managers and senior managers build strong relationships with client management and begin creating relationships in the community to use as referral sources. They start to understand the sales cycle and how to work it. They take an active role in the proposal process.
- **Role for Partners:** Partners represent the firm on sales calls and effectively deal with objections. They build and maintain relationships with clients at the highest levels and also manage the proposal process. Partners are role models to the firm, keep growth a focus, provide positive energy and are mentors to managers and senior managers.

### Start Growing!

Network member Harding, Shymanski & Company, P.C has found this type of staff training from The Whetstone Group invaluable in getting more staff involved in the firm's growth efforts.

"Whetstone's sales training provided individual tactics to concentrate efforts on sales activities," notes HS&Co president Steve Titzer. "It reinforced our culture of approaching growth from the ground up."

In one way or another, everyone in your firm is a sales person. Equip them with the skills and tools they need so they can start contributing to growth!

For more information on sales training opportunities offered by The Whetstone Group, contact Larry Bildstein (319-447-6401 or [larry@thewhetstonegroup.com](mailto:larry@thewhetstonegroup.com)).

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Please contact the Network Office with your comments and information for the next issue by October 7, 2005.

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