



Grow Your Practice – 25 Growth Ideas

1. Start with current clients. Look at clients that are only using one of your services. For example, a high income individual tax return client who is not using your wealth management services, an audit client that is not using any of your consulting services. A client relationship services call is certainly due.
2. Compile a list of clients by NAICS codes (e.g. not-for-profits, construction, manufacturing, professional services firms, etc.), to determine your core clients.
3. Encourage your partners and managers to be aware of the above lists.
4. Hold partners and managers more accountable for cross serving clients.
5. Meet with key clients quarterly about their needs and goals.
6. Maintain a pipeline report by partner and manager on cross serving opportunities.
7. Focus on the pipeline report at your monthly partner and manager meeting.
8. Emphasize teamwork between your compliance and consulting professionals.
9. Provide incentives for clients to use more of your services.
10. Provide ongoing service/product training and updates to all partner and manager level personnel.
11. Quiz your partners and managers about your services and products to be sure they are knowledgeable about them and can discuss their benefits.
12. Institutionalize an on-boarding process for all new and existing employees.
13. Invest in a professional sales training program.
14. Make sure your employees know how to sell benefits to clients.

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15. Encourage your partners and managers to get a copy of the client's current strategic plan.
16. Provide on the job training. It's the best way to learn.
17. Have niche or industry teams develop prospect lists.
18. Target new companies moving into the area.
19. The managing partner and other leaders in the firm must constantly highlight the importance of new business development.
20. Involve sales and marketing assistants in reviewing client accounts, following up on opportunities, etc.
21. Get out of the office, you can't develop new business unless you meet people.
22. Go on joint sales calls whenever possible.
23. Circulate industry best practices to your team.
24. Focus on understanding your clients' real needs. Then figure out how to satisfy them.
25. Keep adding to this list!

Send your ideas to August at aaquila@aquilaadvisors.com.

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