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Life as a CPA: Business Development

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After all the business development buzzwords and tactics (web sites, brochures, seminars, articles, speeches, coaching, motivating, compensating and on and on) have dulled to a whisper, a few simple things remain. It boils down to a few fundamentals to understand about life as a public accountant, and a few outcomes that will result.

Here are ten everyday realities about being a professional in a CPA firm:

1. Know that being a good accountant means a lot more than understanding the technicalities. Very few people (other than your first employers) will ever care about your grades in college or whether you were a Sells Award winner as a CPA. nor will most people get very excited about your ability to quote Sarbanes-Oxley or GASB 34.
2. Prospective clients will be very concerned about three things when deciding whether to hire you: Do they like you? Do they trust you? Do they want to do business with you?
3. Business development in professional services is based on three things: finding, creating and sustaining relationships. You can't do this from your desk. If you want to get clients, you have to get out of the office.
4. You never know where your clients will come from. Therefore, be courteous to your support team, your vendors, and your colleagues. You can't do your job without them, and you want them to rave about you in the community.
5. Clients are not an interruption to your day. They are the reason you get to have a career and a good paycheck. Remember this when they call with what you think are irritating issues or stupid questions.
6. Be responsive to your clients. Don't make them wait. If you make them wait too long too often, they will find an accountant who doesn't.
7. Mother Nature gave you two ears and one mouth. Use them proportionally.
8. Maintain your good manners even when no one else does. People will remember much more about how you act (and how they feel about your behavior) than what you say or what kind of product you give them.
9. Conduct yourself in a way that makes you enjoyable to be around.



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Give your clients and co-workers the benefit of the doubt, and laugh at yourself frequently.

10. Thank your clients early and often. Never, ever take them for granted.

If you make these precepts a part of your daily life, three things will result:

1. You will make more money.
2. You will have more control over your professional destiny.
3. You will have a lot more fun, because of outcomes 1 and 2.

(Melinda Guillemette has a dozen years experience as a CPA firm marketing director and consultant to professionals. She is based in New Mexico. You can reach her at 505/263-9460 or mguillemette@comcast.net

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