THE RELUCTANT SALESPERSON™

A Realistic Approach to Practice Development for the Accounting Professional

The Reluctant Salesperson (TRS) is designed to help accountants, regardless of their service or industry focus, become more comfortable, confident and skilled at developing and nurturing business relationships. This workshop is designed to be a hands-on and highly engaging experience to enable participants to develop sales and client service skills that will be beneficial to them as an accounting professional. Participants build personal marketing plans based on their individual needs, desires and behavioral tendencies and leave with simple, practical tools and behaviors necessary for success and desired business development results. TRS will help participants:

- Learn their behavioral profile by completing and analyzing a DISC (sales version) profile
- Understand what sales IS and what sales is NOT
- Learn to adapt behavior to create alignment with clients, referral sources and prospects
- Discover what clients are REALLY looking for and what creates loyalty
- Better serve their clients by teaching them the Client SpotLight™ system
- Develop an "elevator speech"
- Learn the fine art of small talk and working a room
- Develop their own CRoPs (Clients, Referral opportunities, Prospects and supporting activities) personal marketing plan
- By providing them with an array of sales and marketing tools to be used after the TRS workshop
- Discover the PIF™ Process – how to prepare for, interact during and follow-up on a sales call or client service interaction
- Learn a questioning technique that will get to the core issues their clients and prospects are facing
- Engage in a real-world case study that will allow them to practice and tie all their learnings together

Timing: 2 Days

Recommended CPE Credits: 16

Field of Study: Communications & Marketing

Pre-work: DISC Profile Assessment

Delivery Method: Group/Live

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