How to win more clients over with a great proposal

A Capium whitepaper for accountants.

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Foreword

We've worked with accountants for years now, and if there's one challenge we hear time and again from growing firms, it's: "I've got enough clients, but how do I focus on getting the work I want?"

Pitching for work and putting fee proposals together can be time-consuming – but it's key to working with both more, and more of the right type of, clients. And if you're consistently winning the business you like working with, you'll spend more of your time doing what you want to do.

These days, with digital becoming king and geography being less of a factor, the pool of competition has widened. You know as well as we do that the days of tick-box services are over. And that's no bad thing.

But it does mean it's even more important that your proposal stands out.

With so much choice, your clients – whether they're small business owners, individuals, or more established organisations – are really after one thing: an accountant who listens, adds value, and works in partnership with them.

So, how do you communicate that in a business proposal? Here, we've set out some top tips and tricks, and pointed you towards some handy templates, to get

you started. Once you've got the structure in place, we'll share ways to make things repeatable – so that you're not spending a minute more than you need to put your proposals together in the future.

Getting it right is worth the investment. A clear, transparent, and well-laid out sales proposal can be the difference between landing your dream client or seeing that relationship go to your competitor, instead.

Tushir Patel

co-founder of Capium

About us

Capium is the pioneer of Cloud-connected accounting software for owners of small and medium-sized accountancy practices. Our software suite marries automated accounts production and powerful practice management tools specifically designed to help accountants in practice run a smarter, more efficient, and ultimately more profitable business.

First things first – Audit yourself

Before you start putting pen to paper and get stuck into outlining your USPs or why your prospective clients need services from you, take a quick step back.

Ask yourself: What's the first thing a new client is likely to do when they receive your proposal? The answer's simple: They'll google you.

And if what they find online doesn't match what you're outlining in your proposal – either because your website's out of date, your branding needs updating, or your contact information is missing – there will be doubt in their mind before they've even read your executive summary.

So, do that in reverse before you even start writing.

It's really important to make sure your digital presence is up to date. Start with your website – is it written clearly? Are the services you're about to start selling listed on there? Do you have client testimonials or reviews displayed? Make sure the answer to these questions is 'yes', and you'll be on the right track.

Next, check your contact information, both on your website and your Google My Business profile (if you don't have one of these, set one up – it's free). Make sure your phone number, email address, and location (if you have one) are all up to date. That way, there's no barrier to clients getting in touch when they're ready.

Finally, if you've got company social media profiles (like LinkedIn, Facebook or Twitter), it's worth glancing over them to make sure they're up to date and look professional. Stretched or distorted cover images, posts with typos, or inactive profiles can all be red flags for clients, giving the impression you're not on top of things.

You're about to invest some time and effort into creating a robust business proposal – make sure nothing else online contradicts you before you even get started.

Put the costs upfront

Lots of accountants fall into the trap of front-loading proposals with a wealth of information about their services, the benefits of working with them, and what makes them unique.

But when it comes down to it, what most clients are really interested in is cost. At the end of the day, it doesn't matter how much they like the sound of you, how you work, and what you're offering: If they can't afford you, you'll be out of the running.

It makes sense, then, to put this information right up front. If it's buried at the back after lots of detail, and cost is a real factor for the client you're pitching to, they'll likely just skip to it first anyway to make sure they're not wasting time reading something they won't be able to afford. So, make things easy for them.

Think carefully about your pricing and how you can present it clearly and transparently. Consider tailoring your structure or approach for the client you're pitching for – would a fixed monthly fee work best in this instance? Is a pick and mix price list for different services more appropriate? Or can you provide options for a tiered service, like gold, silver, or bronze?

However you decide to structure your pricing, make sure you back it up with a short narrative about why you work that way and how that benefits your clients. For example, "One price to pay, so there are no nasty surprises" for a fixed price approach or "Make sure you only pay for what you need" for a more pick and mix structure.

Most importantly, once you've decided what pricing structure to offer, lay it out as clearly and transparently as possible. Have two clear columns: The service (with detail about what it is) and price. Don't miss anything out, and make sure you split out things like one-off costs, ongoing monthly fees, or any adjustments you might need to make once you've got a little more information.

Finally, include a schedule for pricing, too, so that clients know exactly what they'd be expected to pay and when they were to go ahead with your proposal.

Show you've listened

At a base level, clients expect you to be able to deliver the services they need. They know you can help them with their reporting, manage their books, or look after their payroll. You're an accountant – so it's a given.

Your opportunity to stand out comes in showing that you've taken the time to listen and understand their business and industry. What are they hoping to achieve? What are their challenges at the moment?

Include, upfront, a summary of what you've understood their goals to be. Try to distil this down to one sentence, like: "You want a safe pair of hands to look after the numbers so that you can focus on what's important: Running your business" or "You're about to invest in another premises and you need to make sure your cashflow is watertight".

Be as specific as you can. Draw on any conversations you've had with them previously – as well as any knowledge you have of their sector. It sounds simple, but playing clients' words back to them shows you've listened and understood.

Then, go into solutions. Rather than simply outlining a list of services, position the way you can help as answers to the specific challenges or problems they're facing. Lead with the benefits (like giving them time back or offering reassurance that they'll never miss a deadline).

Include timelines. When can you get started? How long will it take for them to transfer from their existing accountant, or to get them set up with the right software, for example?

Most importantly, **be transparent about what you can and can't do for them**. As tempting as it may be, don't overpromise to make the sale: clients will see through it. You want to build long-term client relationships built on trust. Transparency is key to doing that.

Focus on the 'how'

We hate to say it, but most accountants essentially offer the same services. And if you're pitching for specific work, chances are the other firms putting proposals in will have the exact same set of services you do.

That means that, when it comes to picking the right accountant for them, clients focus on two things: price and fit. We've tackled price, but a proposal is your opportunity to demonstrate fit – by outlining how you do what you do, and why that's great news for them.

There's a fine line to tread here. You don't want to go into extreme detail where it's not relevant, but you also want to show that your way of doing business is thoughtful and refined.

Avoid falling into the trap of using phrases like 'We'll tailor our services to suit you', and instead include tangible examples of how you put your clients first.

For example, when it comes to the way you interact with clients, do you give them the choice of phone, email, or in-person, depending on their preference? Do you have a custom-built portal, or do you set your clients up with a Whatsapp group so they can reach you on the go? Maybe you make a point of taking them out to an informal lunch once a quarter, to chat about how their business is going?

Clients expect you to be quick and effective, so set out what really makes what you do different. Back up any claims of being efficient, friendly, or transparent with examples that mean something, and they'll get a feel for what it's really like to work with you.

Another excellent way to showcase how things would be for your clients if they chose to work with you is to include relevant case studies and testimonials.

If they can see that you've worked with people or businesses just like them, look at what a difference you were able to make or how you helped them achieve their goals, and hear firsthand what that experience was like, they'll feel more confident that they know what they're getting.

Think about two or three really relevant or similar examples you can include and structure them clearly: Outline the problem, go through the solutions, and describe the result.

If reviews and testimonials aren't part of your process at the moment, think about implementing it – the best form of marketing is word of mouth, so get your happy customers to do the hard work for you.

Make the next steps easy

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If a client decides they want to go ahead with your proposal, it's important that it's really clear what the next steps are – and that they're easy to get started with.

Include these at the front, along with your introduction, and set out what they'd need to do if they decided to go ahead and work with you. Make the action they'd need to take really straightforward – send you an email, click a button, or accept something on a portal.

Repeat these steps throughout the document, but make sure they're really clear at the beginning and the end. Include reference to a date that you'll check in with them to follow up, too. Try not to add anything more to their plate, and reassure them that you'll be in touch in a week (or so) if you don't hear from them first.

It's important, too, that these next steps are not just easy for the business owner or individual reading the proposal, but that they're easy for multiple stakeholders to understand and take action if needed, too.

Remember, it might not be the decision of one person to go ahead with your services, so make sure the next steps (and entire proposal!) are laid out in a way that makes it simple for anyone to pick up, read and take forward.

Looks are important

A sharp and snappy design will really elevate your proposal to the next level – but it can also help make things more practical, effective, and repeatable, saving you time when it comes to pitching for future work.

By getting the design right the first time (including things like your logo, brand colours, and the correct font), you'll have a simple structure in place to work with and use as a template. Make sure you've got a clear cover page, that any images or headshots are high quality, and include a contents page to make navigating the document really easy.

People are hugely put off by poor design, which makes them less likely to read the actual content of your proposal. Consider font size, white space, and how 'busy' any pages you put together are. The more straightforward, clean, and clear, the better. Articulate things visually, with coloured graphs or diagrams, for example, where you can.

Make sure, that, ultimately, anything you include is there for a reason, and, while you want the document to be visually appealing, don't go overboard with colour and imagery if it detracts from your message.

If you don't have any design resources (or even a company brand), fear not. There are lots of resources out there that are designed to help you create a really slick and intuitive proposal that you can customise and then use as a template.

Look at companies like GoProposal or Ignition. They vary in price, but some offer brilliant integrations (like with Capium, so that if your prospective client accepts, they can simply click through to get started). Here's a handy overview of the different software out there to help you make a decision.

Once you've got a template you're happy with – reuse it! You can make sure your proposals are tailored and bespoke by following the steps above, but you don't need to reinvent the wheel every time.

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By having a master template that you can edit, you'll know all the core information is correct, and be able to drop in and tweak things to suit the specific client you're pitching to. Remember, though, to check thoroughly that you haven't left a previous client's name in there by mistake – there's nothing that'll put someone off more.

As you write more proposals, it's useful to think about building a library – perhaps based on sector or service – of relevant content and case studies that you can essentially drag and drop into the next version, depending on whose business you're trying to win.

This will all help make things quicker, which brings us onto our last point: Speed is really of the essence.

If a client's asked you for a proposal, or you've had a conversation and promised to send one, do it within 24 hours of a call. If it's a really complex solution that requires lots of thought and time, don't take any longer than 72 hours.

Set those expectations from the start, and you'll give a great impression of how punctual and reliable you are – bringing to life what it's really like to work with you.
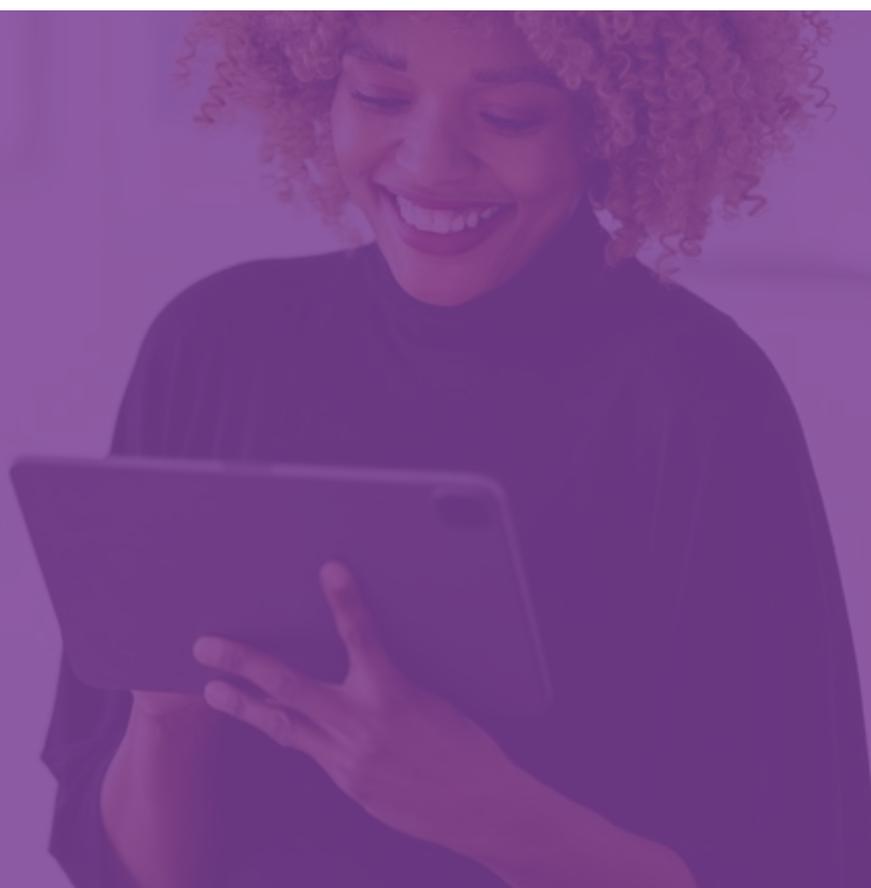
Conclusion

Putting stellar proposals together to win you the type of client you really want to work with takes a bit of upfront time and investment. You'll have to consider what message you want to convey, take a frank and honest look at what benefits you really bring clients, and then work out how to set it out clearly and transparently.

It might seem like hard work, but it's a short-term commitment that'll bring you no end of rewards in future. By spending the time and effort at this stage, you'll create a really robust and solid platform to build on and develop as you grow.

You'll probably find the entire exercise useful, too, as it'll give clarity about your business, your strengths and weaknesses, and how you're able to demonstrate them.

Your sales proposal will evolve over time, and each one you write will be of benefit – whether because you've refined some wording, gained more content for a library for next time, or managed to integrate it with other systems, making the next steps for clients even easier.

By creating a well-designed, thoughtfully written, and repeatable proposal process, you'll be well on the way to winning more of the clients you'd love to work with.

**Call us on 0203 322 5578
or find out more at capium.com**