

## *Does Your Firm Have a Sales Culture?*

Where does selling fit into your firm's culture? The word "sell" can bring to mind all kinds of negative connotations for many CPAs, who often pride themselves in the advisory and consultative services they provide clients, but not in "selling stuff" to them. However, they can be one in the same when you are offering products and services that will genuinely benefit your clients and fulfill their unmet needs.

To develop a true sales culture in your firm, and thrive in this uncertain economy, your leadership team must be committed to establishing a firm-wide sales culture. Your firm's sales culture will mirror your managing partner's and the rest of your leadership team's orientation to and attitude about selling. For your sales culture to flourish, you must first acknowledge and then overcome any negative stereotypes to selling, then commit to implement a firm-wide sales initiative, ensure that your sales function has clearly defined roles and responsibilities, and identify the benefits of selling, or "what's in it for me," for all members of your team.

When you have made the commitment to develop or enhance your firm's sales culture, the following actions will help ensure your success:

- **Identify a sales leader or "coach."** The sales coach will take responsibility for the firm's overall sales performance and is involved in managing the sales pipeline, providing guidance and support to the whole sales team, and helping to close business. This person may be the managing partner or someone else in the firm who is particularly adept at developing business. The sales coach is often more involved in smaller organizations with the potential to be less involved as the organization grows. Whoever you identify as the sales coach for your firm, he or she needs to be committed to the role on an ongoing basis and have the time necessary to perform sales leadership tasks in addition to their other duties for the firm.
- **Define other sales roles in your firm.** The first position you should consider adding after identifying a sales coach is a sales coordinator. A sales coordinator may also have marketing duties and/or be part-time and would be responsible for providing administrative support, including proposal development, letter creation, and sales coordination, pre-qualifying leads, entering information into your CRM system, and managing the pipeline. As your pipeline grows, you may wish to add an account manager, who is a "point person" for your existing clients, and/or a business development representative, whose role is to generate new name business.
- **Adopt a single sales methodology to use for all prospects in your firm.** There are many great sales methodologies you could adopt, but be sure yours includes the basic steps of an introduction, qualification and needs analysis, presenting your solution, closing, and follow through. In a later marketing article for this column, we will share a six-step sales methodology that will help you establish a standardized method for managing the various phases of selling in your firm.
- **Define your internal sales processes and ensure that all members of the firm responsible for selling (the sales team) are committed to following them.** Sales

process is an important part of your sales culture and includes actions such as entering each prospect into your contact management database, assigning an owner for the prospect, appointing a “rating” or closing probability percentage, and establishing (and following) a pipeline meeting process. Each element of your sales process will need a clear owner assigned to ensure success.

- **Hold regular sales meetings and establish other internal communications as needed to reinforce your sales culture.** Along with holding regular pipeline meetings as part of the sales process mentioned above, you will want to maintain ongoing communications to all in the firm to reinforce and refine your sales process and ensure that it is and continues to be seen as a significant part of your practice.

By completing these steps, you will begin to reap the benefits of having a genuine sales culture, including a consistent method for managing sales opportunities with both existing and prospective clients, clearly defined sales roles, smoothing out peaks and valleys in revenue for your firm, increasing resource use and enabling you to more accurately predict your resource needs, and enhancing your firm’s overall revenue and cash flow. In addition, you will shift your firm’s overall culture to embrace selling as a core and foundational process in your practice.

*Krista Remer is a consultant and Jennifer Wilson is a partner and co-founder of ConvergenceCoaching, LLC, a leadership and marketing consulting and coaching firm that specializes in helping CPA and IT firms achieve success. Learn more about the company at [www.convergencecoaching.com](http://www.convergencecoaching.com).*