





# Managing your client acquisition and sales process in Karbon



# Your hosts



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Head of Marketing



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Sales Director

**Before we get started, some housekeeping...**

zoom

1. Close any open apps
2. Ask and we'll answer
3. Have fun!

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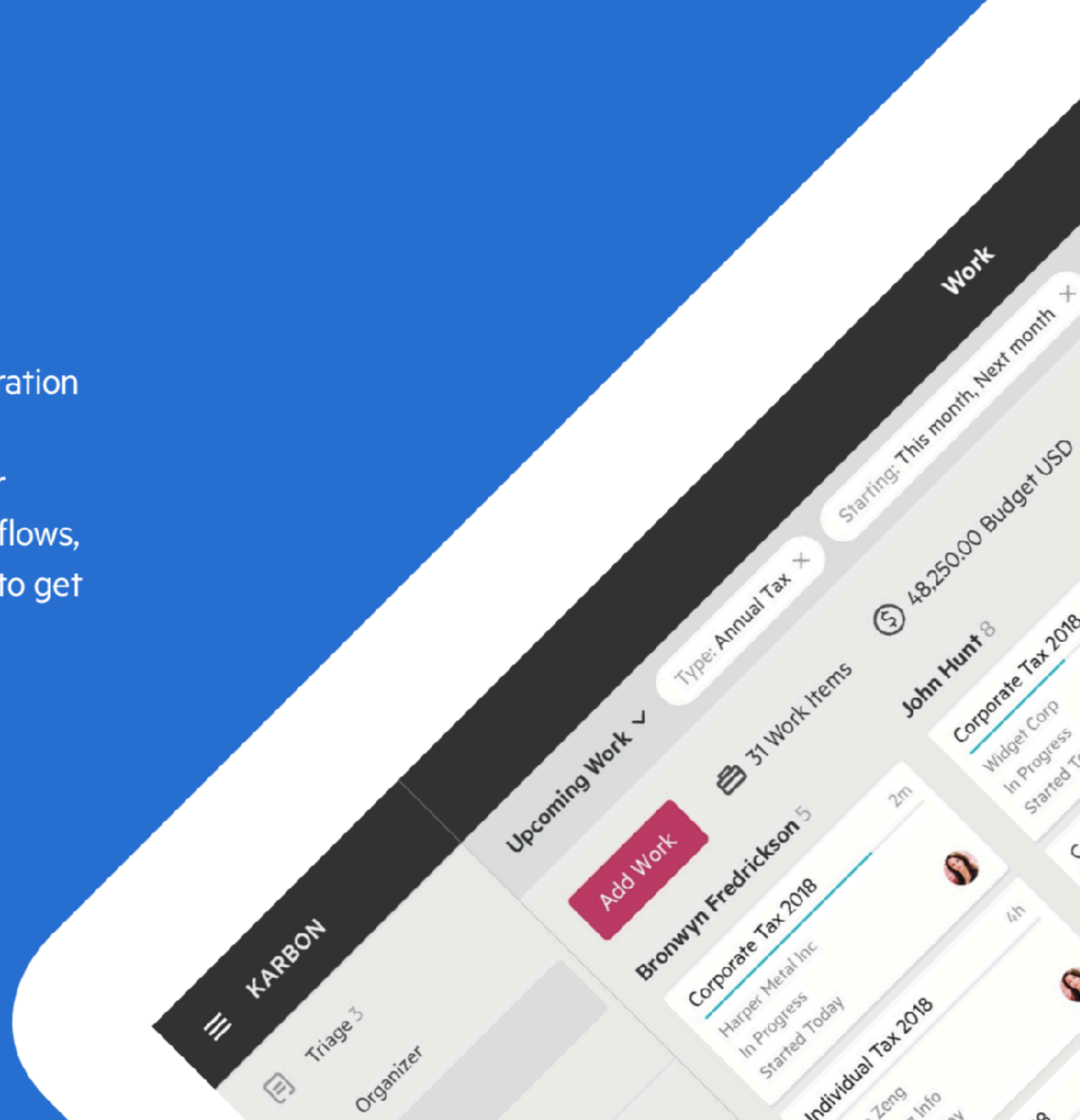


# How work gets done.

Karbon is an advanced workstream collaboration platform, ensuring visibility across teams, departments and locations. Combining your email, discussions, tasks and powerful workflows, Karbon keeps everything your team needs to get work done in one place and in context.

Learn how you can maximize your team's output with Karbon.

Visit [karbonhq.com](https://karbonhq.com)



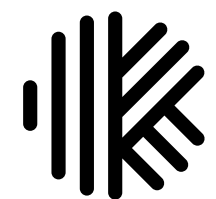
1. **Simple, effective sales process**
2. **Prospect to sales work template**
3. **Automating engagements**
4. **Demonstration in Karbon**



# Simple, effective sales process

# A simple, effective sales process

- **Step 1:** Identify your target market / clients
- **Step 2:** Put in place the right measurements
- **Step 3:** Structure your sales & marketing for success
- **Step 4:** Put the right processes & infrastructure in place
- **Step 5:** Build your inbound marketing channels
- **Step 6:** Smartly build your outbound channels
- **Step 7:** Scale up as it becomes accretive





# A simple, effective sales process

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*Learn the full simple sales process at: <http://bit.ly/2kWswaj>*



A black digital scale with a blue LCD screen showing '0.0' and an 'Eat Smart' logo at the bottom. The scale is positioned diagonally on a white background. The text 'If you can't measure it, you can't improve it.' is overlaid on the scale's surface in a white, italicized font.

*“If you can't measure it,  
you can't improve it.”*

*- Peter Drucker*

# Measurements for managing your firm

- **Overall performance metrics**

Bookings & revenue (MRR/ARR;  
recurring vs non-recurring)

Gross profit / margin

Churn (\$, %)

Cost acquiring customers (CAC)

Lifetime value (LTV)

Cost of cancellation (COC)

Month over month growth (MoM)

Revenue per employee

Avg revenue per client (by service)

Cost & revenue mix

- **Ratios & metrics of interest**

LTV:CAC

Quick ratio

Magic number

Best, worst accounts (against median)

Most active staff members

Efficiency, task & work insights & ratios

- **Sales measures**

Sales closure rates

Opps (open, close, quality, fit, size, when)

Average time to close (opps)

***Run your practice like a  
small business.***



# The sales & marketing resources you need

- Don't just hire a Business Development Manager (BDM)
- If possible, hire two salespeople (SDRs) at a time
- 2:1 ratio for SDRs to account manager
- Two hiring mantras:
  - Hire for aptitude & attitude
  - Hire for passion, train for skills, fire for example
- Hire someone with prior experience (target market and/or function)
- Small firm or early on? Consider contract resources.
- Everyone has an “Always Be Closing” mindset

# The process of sales

- Spur activity through referral, inbound and outbound marketing activities
- Qualify leads to determine opportunity size, fit and prioritization
- Determine & finalize the scope of work
- Drive to close (immediately or via follow-up close meeting)
- Get a signature
- **Tips:**
  - *Close rate: Eliminate all steps taking time, client work or friction*
  - *Capacity planning: Get visibility of # of deals, quality, expected close dates*



# The ins and outs of sales

- **Numbers to note**

50-75% closure rate

25-50% opps open rate

30 days to close; 1 week best-in-class

Touch opps at least every 3 days

- **Key things to qualify (fit)**

Target market

Systems

Processes and services

Budget

- **Tips & tricks**

Use existing clients to get specific referrals

Push opps through as fast as possible

Drive from emails to calls & meetings

Persistence pays (7 touches)

Finish one task, spawn the next

Have well documented processes

Visibility of the pipeline is critical

Niche, message, website

Track activities with minimal effort

Use tech to eliminate friction (eSignature)





# Prospect to sale work template



**“Your clients will remember how you made them feel, long after they’ve forgotten what you’ve done for them.”**

*— James Ashford, GoProposal, Director —*

# The red carpet treatment (for sales)

Marketing Qualified Lead



Sales Qualified Lead



Close

# The red carpet treatment (for sales)

## Marketing Qualified Lead

- Auto-respond to prospect
- Auto-schedule discovery mtg
- Review & qualify lead
- Remind via email & text

## Sales Qualified Lead

## Close

### Red carpet actions:

- Instantly respond back to the client on initial contact.
- Use Calendly to auto-schedule the discovery meeting (plus auto-create the Zoom video call).
- Be sure to remind via email and text to get the meeting done.



# The red carpet treatment (for sales)

## Marketing Qualified Lead

- Auto-respond to prospect
- Auto-schedule discovery mtg
- Review & qualify lead
- Remind via email & text

## Sales Qualified Lead

- Prime the prospect #1
- Conduct scripted discovery mtg

## Close

### Red carpet actions:

- Send short personalized video outlining the purpose of the call and what to expect.
- Conduct a scripted discovery call to confirm alignment.
- Schedule the 1:1 proposal meeting in the discovery meeting.

# The red carpet treatment (for sales)

## Marketing Qualified Lead

- Auto-respond to prospect
- Auto-schedule discovery mtg
- Review & qualify lead
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## Sales Qualified Lead

- Prime the prospect #1
- Conduct scripted discovery mtg
- Prime the prospect #2

## Close

### Red carpet actions:

- Confirm the proposal meeting and request access to their accounts ahead of the meeting.
- Send short welcome video from firm owner to outline proposal meeting plus sales brochure.
- Provide a quick video explaining where to go (directions) and what to expect (agenda).

# The red carpet treatment (for sales)

## Marketing Qualified Lead

- Auto-respond to prospect
- Auto-schedule discovery mtg
- Review & qualify lead
- Remind via email & text

## Sales Qualified Lead

- Prime the prospect #1
- Conduct scripted discovery mtg
- Prime the prospect #2
- Prepare for prospect (day of)

## Close

### Red carpet actions:

- Brief the team on who is coming in and remind to welcome them.
- Get personalized signage in place (carpark and welcome signs).
- Meeting room is prepped, guest is greeted at the door, and drinks menu given.

# The red carpet treatment (for sales)

## Marketing Qualified Lead

- Auto-respond to prospect
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## Sales Qualified Lead

- Prime the prospect #1
- Conduct scripted discovery mtg
- Prime the prospect #2
- Prepare for prospect (day of)
- 1:1 Proposal meeting

## Close

### Red carpet actions:

- Give a book at the meeting as a gift and to provide some sage advice.
- Build and collaborate on the proposal in the meeting. Listen. Give value. Modify as needed.
- Get a signature. If not, book the follow-up call in the meeting, and email the proposal after.

# The red carpet treatment (for sales)

## Marketing Qualified Lead

- Auto-respond to prospect
- Auto-schedule discovery mtg
- Review & qualify lead
- Remind via email & text

## Sales Qualified Lead

- Prime the prospect #1
- Conduct scripted discovery mtg
- Prime the prospect #2
- Prepare for prospect (day of)
- 1:1 Proposal meeting
- Follow-up email (with proposal)
- Remove objections
- Follow-up call & close

## Close

### Red carpet actions:

- Send a screen capture video of the proposal (immediately after the meeting).
- Nurture the prospect by sending video case studies of their stated objections.



# The red carpet treatment (for sales)

## Marketing Qualified Lead

- Auto-respond to prospect
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## Sales Qualified Lead

- Prime the prospect #1
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- Prepare for prospect (day of)
- 1:1 Proposal meeting
- Follow-up email (with proposal)
- Remove objections
- Follow-up call & close

## Close

- Get signed letter & authorization
- Conduct Welcome call
- Send thank you email
- Process payment
- Complete onboarding work

### Red carpet actions:

- On proposal acceptance, send a personalized welcome video.
- Send a thank you card and/or gift to welcome them as a client.
- Kick-off the onboarding project and 1st on boarding meeting.

Request to get the work template: [karbonhq.com/template-upload](https://karbonhq.com/template-upload)

Client onboarding (webinar best practice) — Work template

Edited Nov 12  
Used to create work 1 time  
Last used Oct 2

TasksDetails

CLIENT TASKS

Onboarding checklist – Will be sent 3 days before work start date [Sending Settings](#) | ⌚ Custom reminders

Add Client Task

Client kick-off

Add Task

⚡

When all of the tasks in the section above have the status 'Completed' change the status of all of the task in this section to 'Ready To Start'

⚡

When all of the tasks in the section above have the status 'Completed' change the status of the work to 'Setup'

Confirm all previous sales activities are complete

☐

Ensure all the following activities have been completed: Onboarding working team assigned Client folder in file mgmt system has been created Engagement letter/contract signed and archived Payment authorization is complete and archived First payment has been processed Details for prior

Due same day

S

Contact prior accountant, perform required client checks, and inform tax authorities (if applicable)

☐

If the client has a prior accounting professional, complete the following:Contact client's prior accountant via client task for access to necessary systems, documentation, and details. Instruct accountant to upload everything needed to the client task or to the instructed client folder in your file

Due 1 day after

O





# Automating engagements





**Proposal**



DASHBOARD



Watch this short video, to quickly see how this works or view the [help section](#) to learn more

MY ACCOUNTANCY PLACE

VIEW:

WON ▾

PROPOSALS ▾

FROM THE LAST 30 DAYS ▾

FOR ALL STAFF ▾

5

PROPOSALS  
PRODUCED

17% ↓

5

PROPOSALS  
WON

25% ↑

£1,972

TOTAL MONTHLY  
REVENUE

2% ↓

£394

AVERAGE MONTHLY  
REVENUE

13% ↓

£2,477

ONE-OFF  
REVENUE

COMPARED TO MONTHLY TARGETS

[EDIT TARGETS](#)

6

PROPOSALS  
PRODUCED

4

PROPOSALS  
WON

£2,000

TOTAL MONTHLY  
REVENUE

£450

AVERAGE MONTHLY  
REVENUE

£0

ONE-OFF  
REVENUE

RECENT ACTIVITY

CLIENT	£/m	
Client 1	£400	<a href="#">VIEW</a>
Client 2	£0	<a href="#">VIEW</a>
Client 3	£226	<a href="#">VIEW</a>
Client 4	£634	<a href="#">VIEW</a>
Client 5	£1,858	<a href="#">VIEW</a>
Client 6	£130	<a href="#">VIEW</a>

WHAT'S NEW?

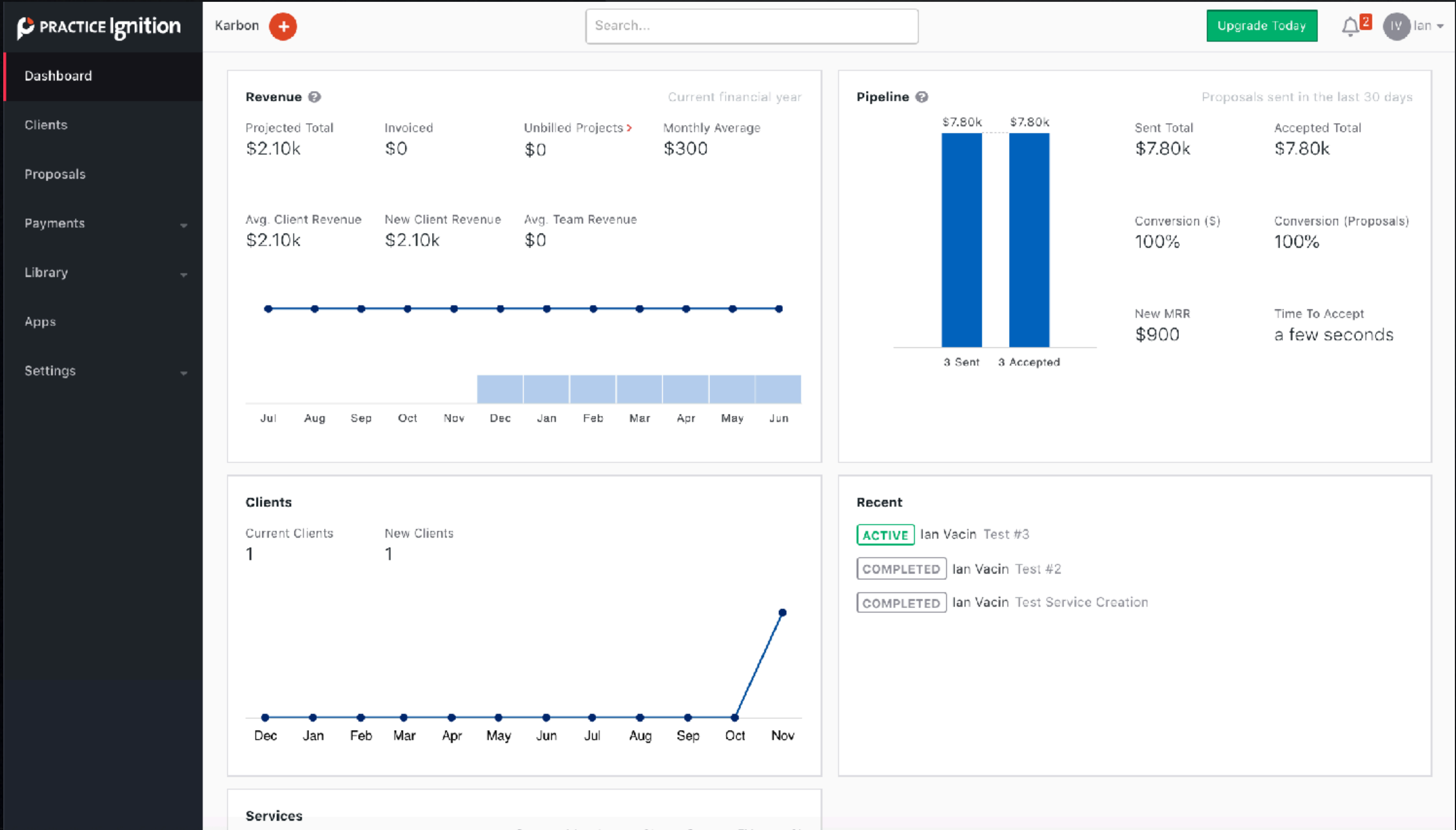


FEBRUARY 2018

We have some exciting new enhancements, including Actionable Dashboards, an Enhanced Proposal Page & Draft Proposals. To discover more [WATCH THE VIDEO >>](#)







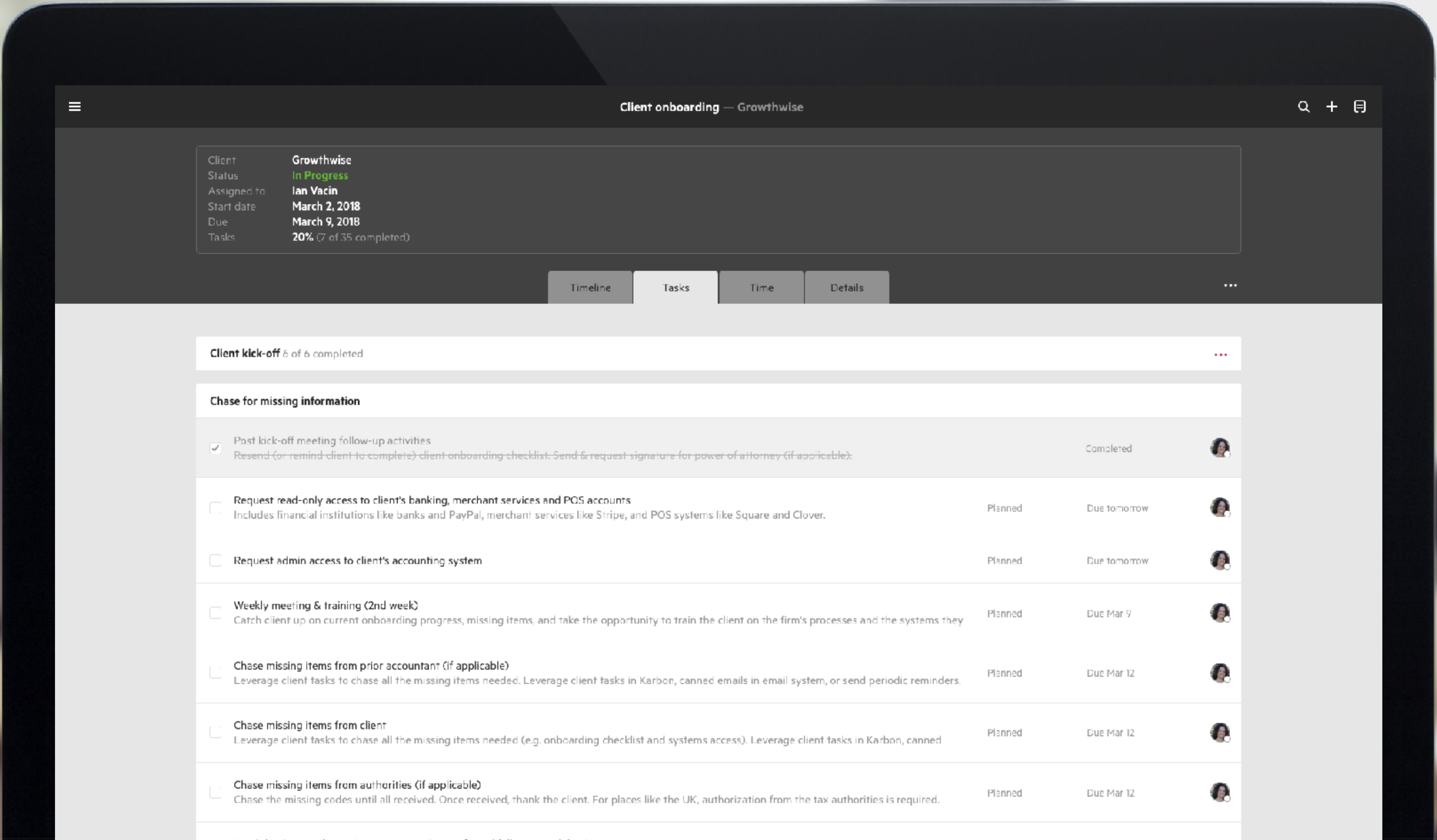


**Proposal**



**Engagement**

Signed proposals will trigger Karbon to create the work from work templates.







**Proposal**



**Engagement**



**Work**

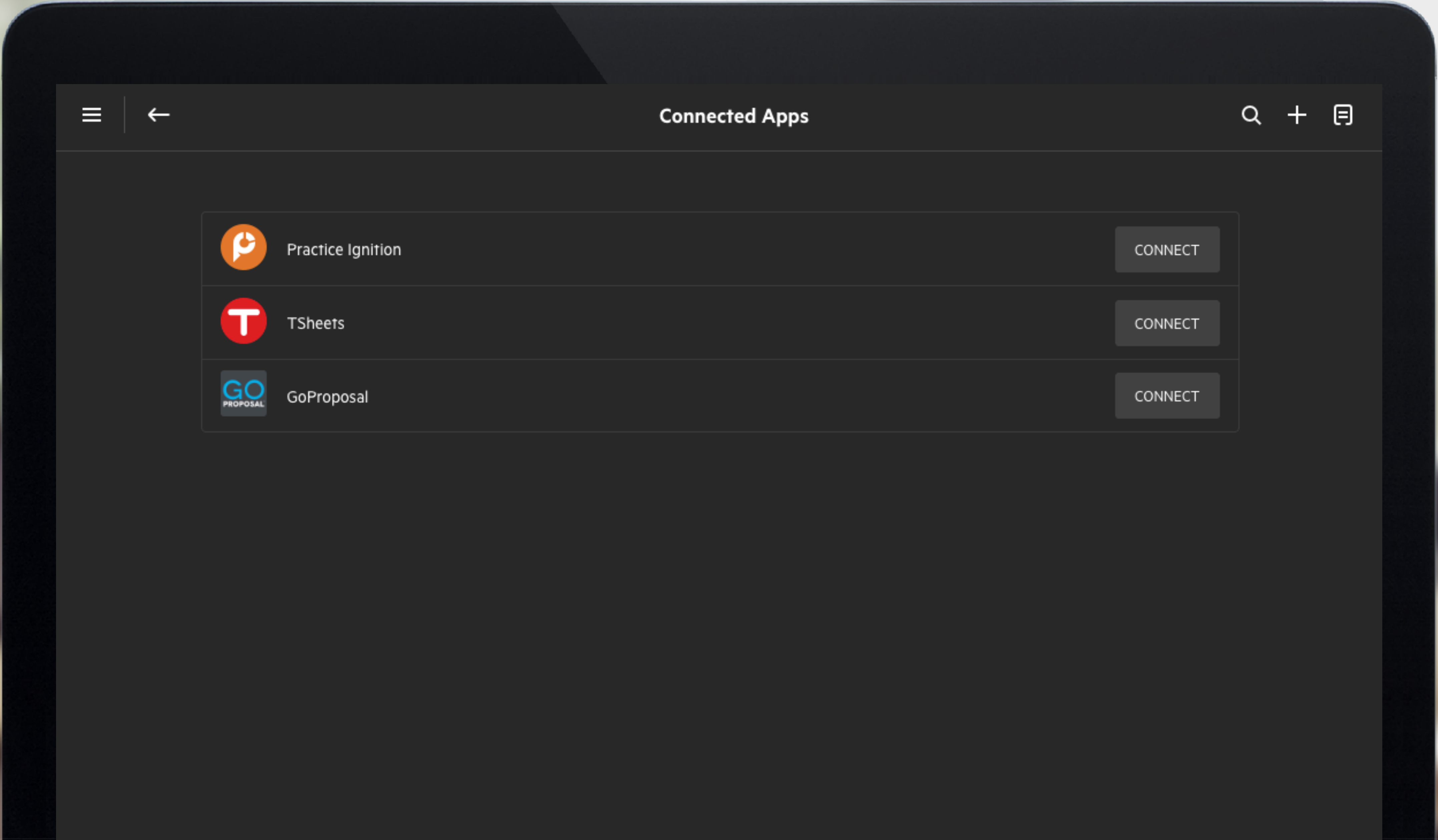
# Integrate Karbon with Practice Ignition

1. **Setup:** Complete the necessary setup of each system independently.
2. **Link:** Copy the token: Karbon > Practice Settings > Connected apps and insert: PI > Apps > Karbon > Karbon API Key. Click to connect.
3. **Map:** Associate Karbon work templates to individual service line items via PI > App > Karbon > Work Templates. Be sure to enable afterwards.
4. **Enable:** From the PI > Apps > Karbon section, be sure to click the Enable button to turn on the integration.
5. **Use & win:** Create a proposal, get the signature, and work just flows.

# Integrate Karbon with GoProposal

1. **Setup:** Complete the necessary setup of each system independently.
2. **Link:** Copy the token: Karbon > Practice Settings > Connected apps and insert: GoProposal > Settings > Integrations > Karbon.
3. **Map:** Associate Karbon work templates to individual GoProposal line items via GoProposal > Configure > Line Items > Edit Line.
4. **Choose:** When creating a proposal, assign to the correct Karbon client OR create new organization/client in conjunction with the proposal.
5. **Win:** Close the prospect, get the signature, and the work just flows.

Check out the integration guides: [help.karbonhq.com/connected-apps](https://help.karbonhq.com/connected-apps)







GoProposal.com  
@GoProposal  
hello@goproposal.com



PracticeIgnition.com  
@practiceignition  
sales@practiceignition.com



# Demonstration in Karbon



# Learn in Karbon how to:

- Add a contact (global add or from an email)
- Create a work item for sales (name as “Prospect” or use a work template)
- Complete the sales process (change work status from MQL - SQL - Close)
- Use GoProposal or Practice Ignition to close the sale
- Upon engagement signature, update and review the created work in Karbon
- Get the work done and make the client happy!

# Wrap up



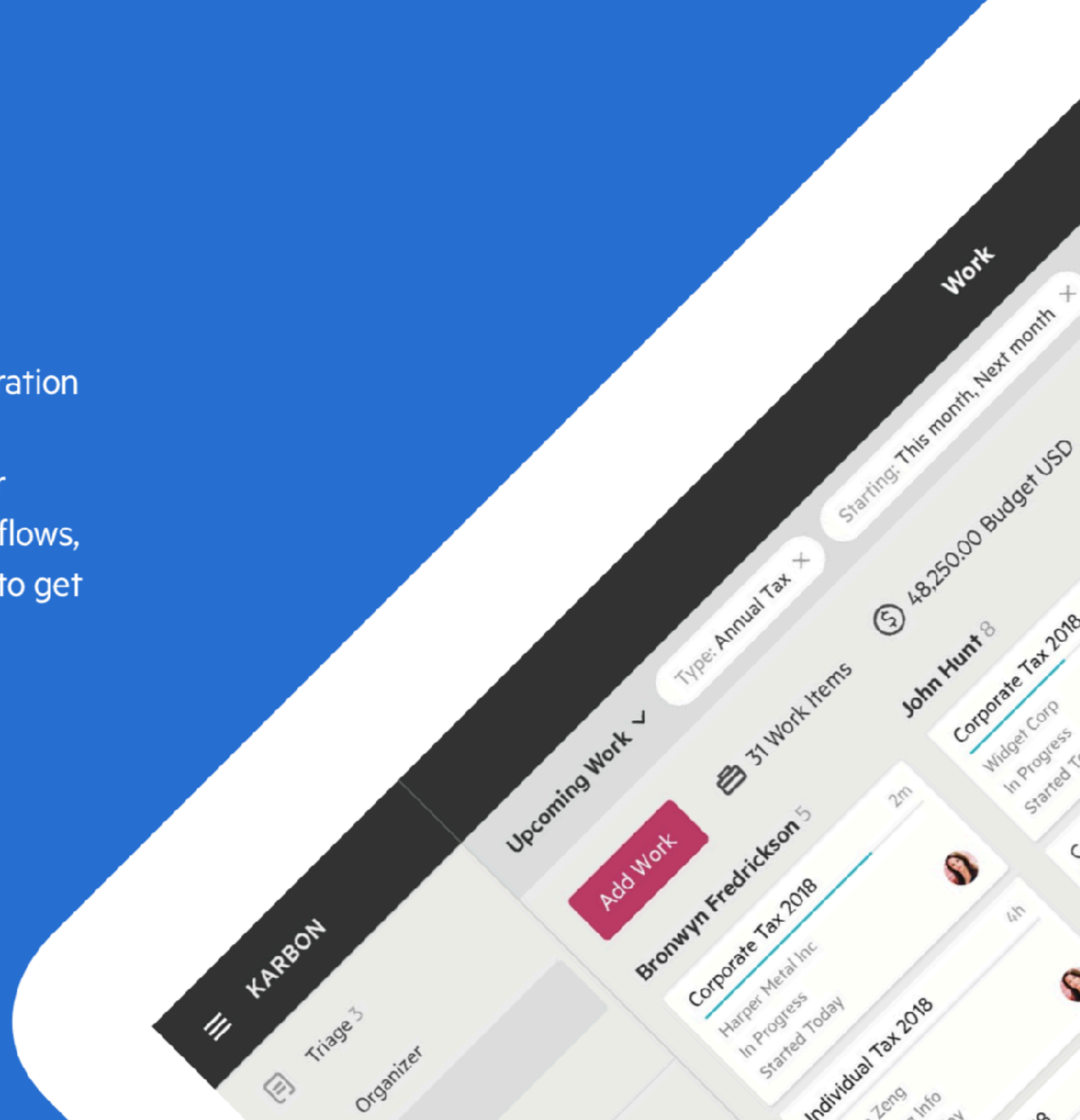
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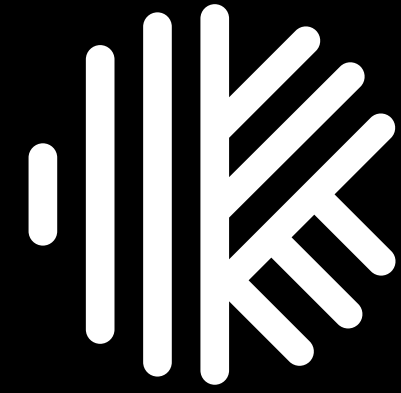
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**Questions?**



# Thank you

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