

# The mindset required to sell and succeed

[karbonhq.com](https://karbonhq.com) | [goproposal.com](https://goproposal.com)



*“You are not running an accountancy firm;  
you’re running a business.”*

— James Ashford, GoProposal, CEO & Founder

*“You are not running an accountancy firm;  
you’re running a business.”*

*“People will forget what you say and forget what you do,  
but they will never forget how you make them feel.”*

— James Ashford, GoProposal, CEO & Founder

- 1. Close down any open apps**
- 2. Ask and we'll answer**

# Meet your hosts



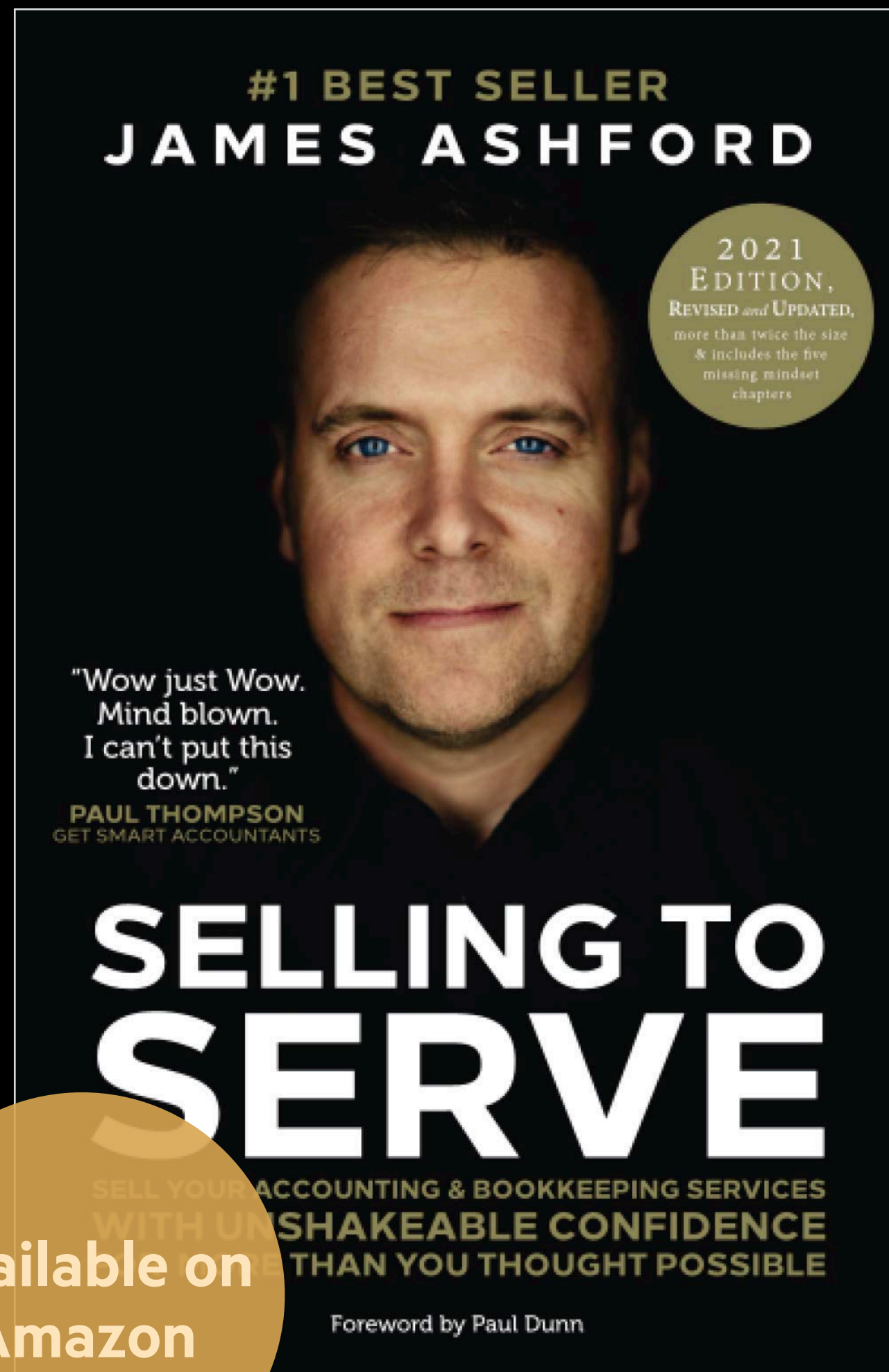
**James Ashford**

GoProposal  
CEO & Founder



**Ian Vacin**

Karbon  
Chief Customer Officer



<https://amzn.to/3d1iFbU>



# Selling to Serve — Revised Edition

*The Breakthrough Sales System For Accountants*

- Is this really a bad client?  
[goproposal.com/bad](https://goproposal.com/bad)
- GLOSS method  
[goproposal.com/resources/gloss-method/](https://goproposal.com/resources/gloss-method/)
- The sales process blueprint  
[goproposal.com/blueprint](https://goproposal.com/blueprint)

# goproposal.com





[Help Center](#) [Academy](#) [Community](#) [Login ↗](#)

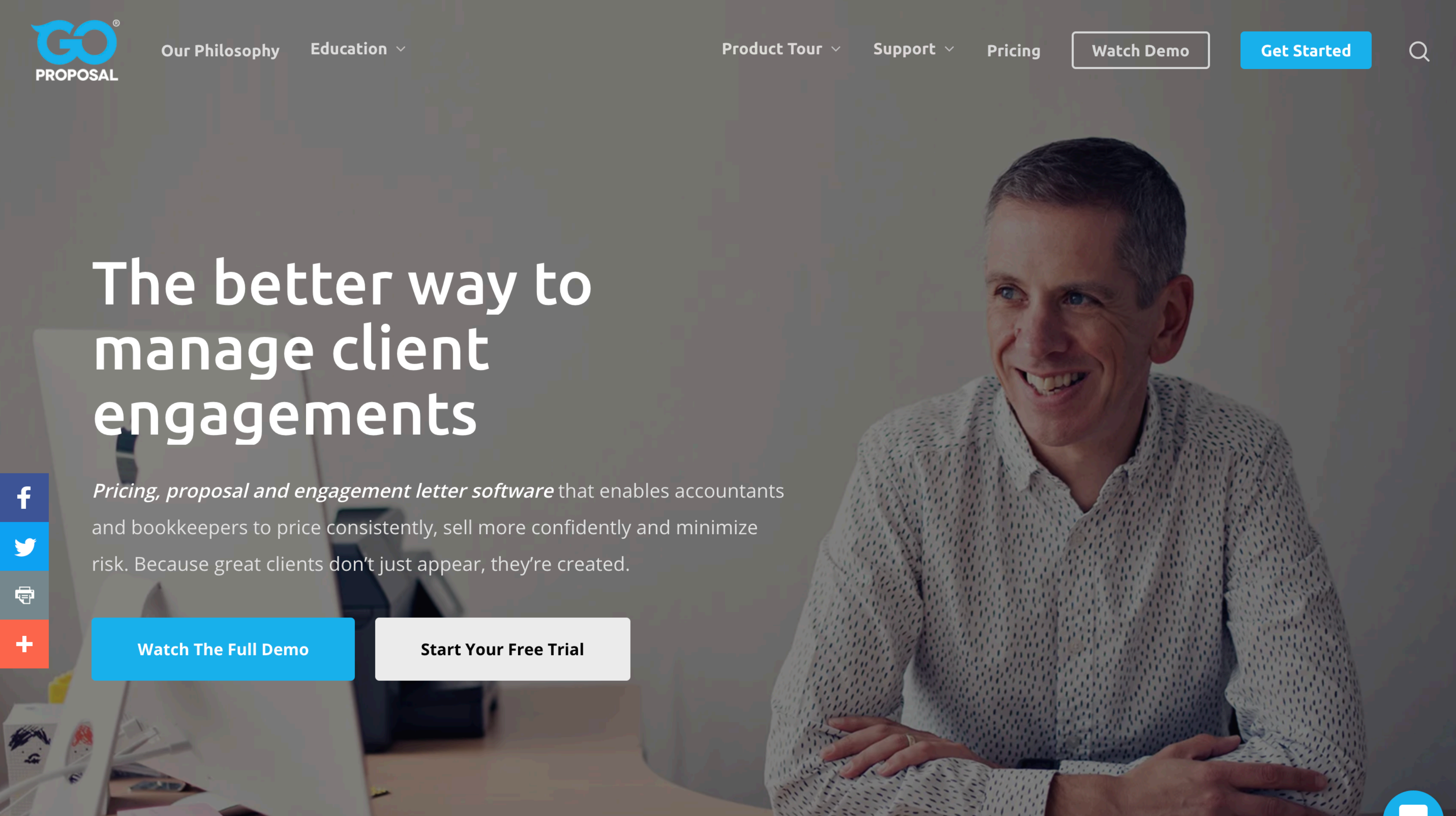
 [Our Philosophy](#) [Education ▾](#) [Product Tour ▾](#) [Support ▾](#) [Pricing](#) [Watch Demo](#) [Get Started](#) 

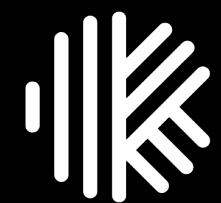
# The better way to manage client engagements

*Pricing, proposal and engagement letter software* that enables accountants and bookkeepers to price consistently, sell more confidently and minimize risk. Because great clients don't just appear, they're created.

[Watch The Full Demo](#) [Start Your Free Trial](#)

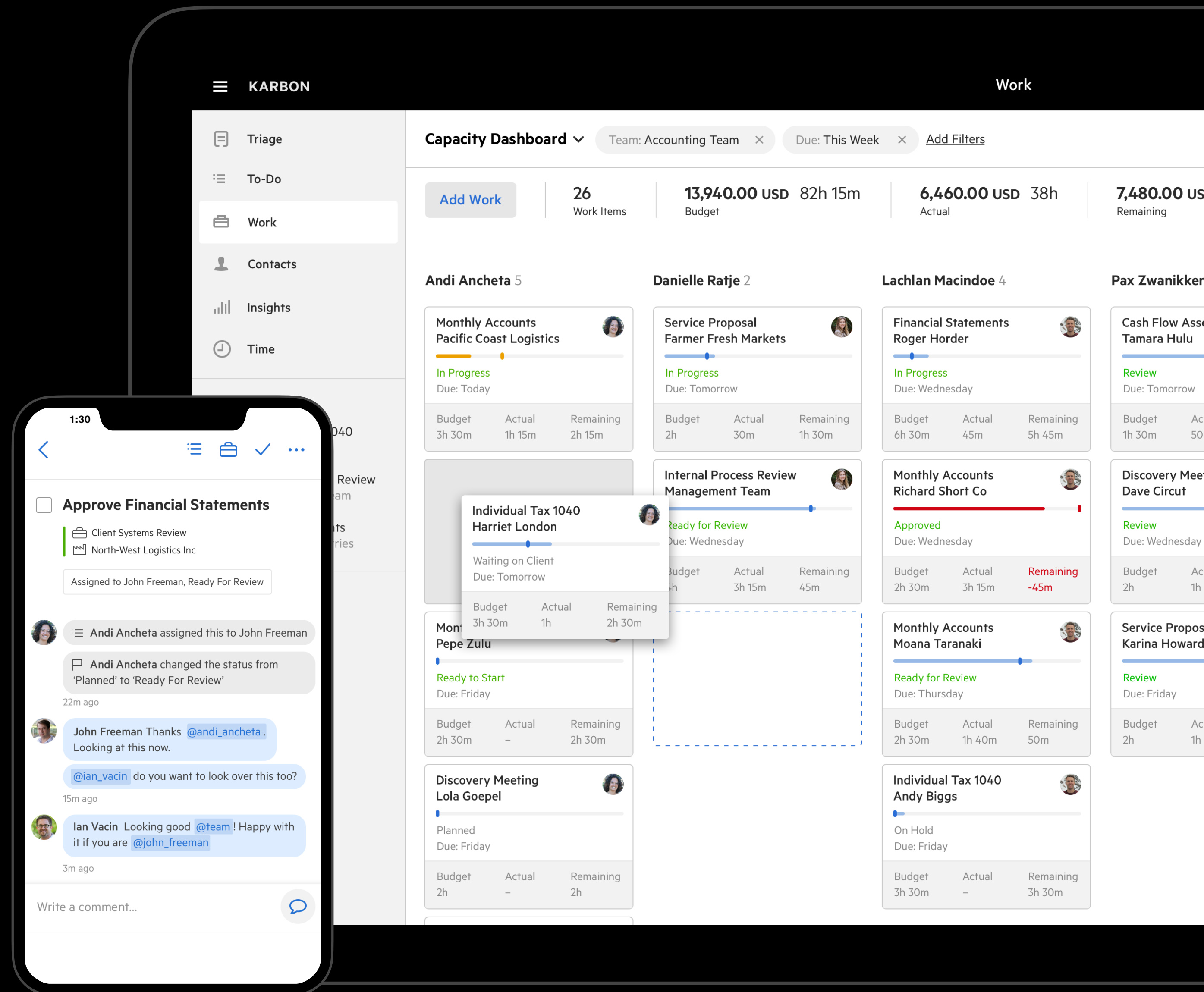




# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



**Let's chat about some common ground...**  
**Financial lessons in prior endeavors.**

*“To empower the world’s accounting business to build the most valuable relationships with their clients.”*

— James Ashford, GoProposal, CEO & Founder

*“To enable accounting professionals to be as successful as possible in order to positively impact the small businesses that they serve.”*

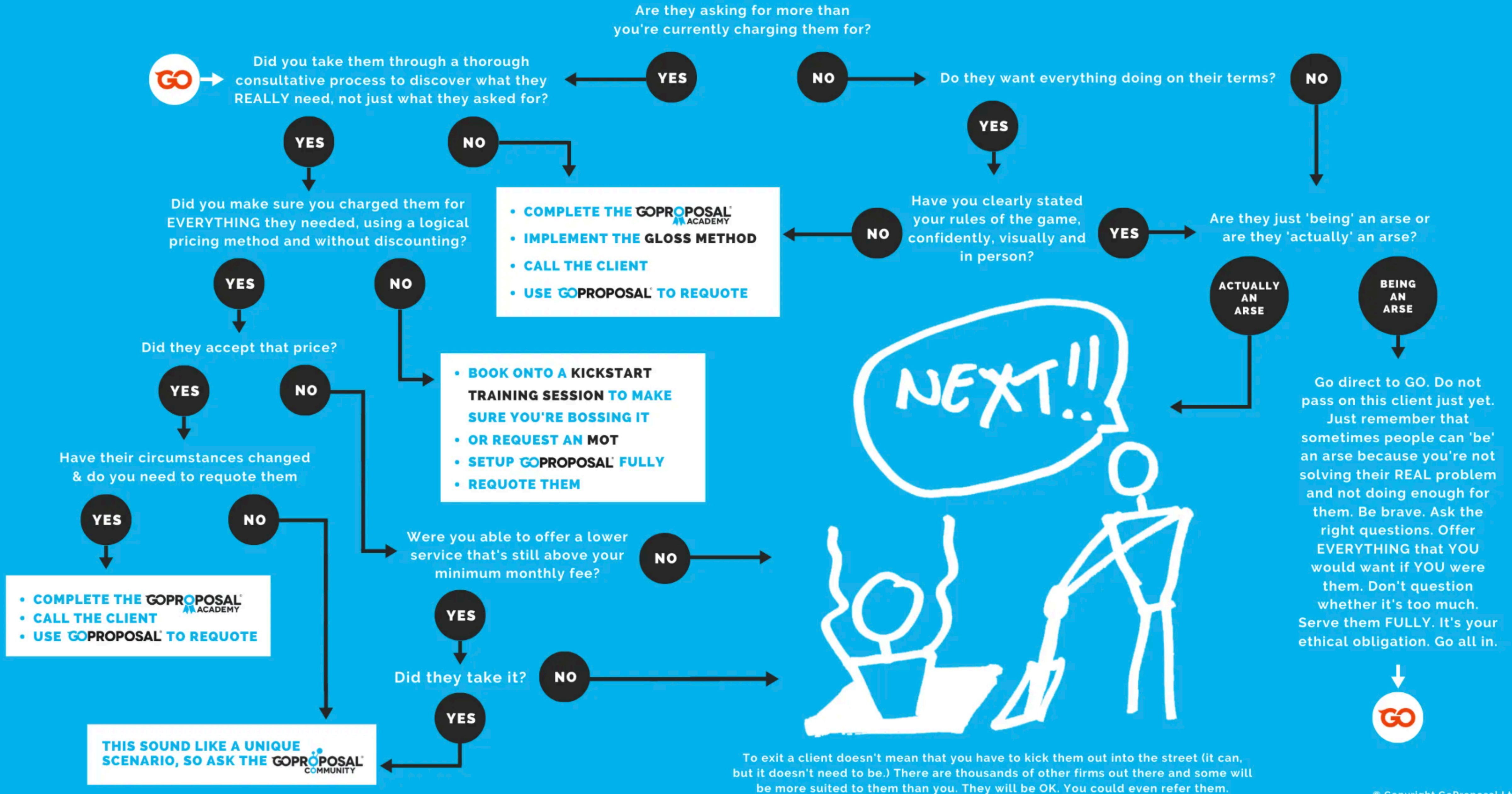
— Ian Vacin, Karbon, CCO/COO & Co-founder

- 1. The why**
- 2. The mindset**
- 3. The effortless sales system**
- 4. Key takeaways**

**Requires a fundamental shift in  
psychology and behavior.**

*“Great clients don’t just exist;  
they’re not found... they’re created.”*

— James Ashford, GoProposal, CEO & Founder



*“You give your time away for free. You give extra services away for free. And all the while you’re inadvertently communicating to your clients that your services have no value, so guess what... they stop valuing what you do.”*

— James Ashford, GoProposal, CEO & Founder

# Three goals of firms

1. **Clients:** Impact clients.
2. **Employees:** Create thriving culture.
3. **Shareholders:** Make money.

“It’s never been about whether they can afford you.  
It’s always been about the time you can afford them.”

# Three goals of firms

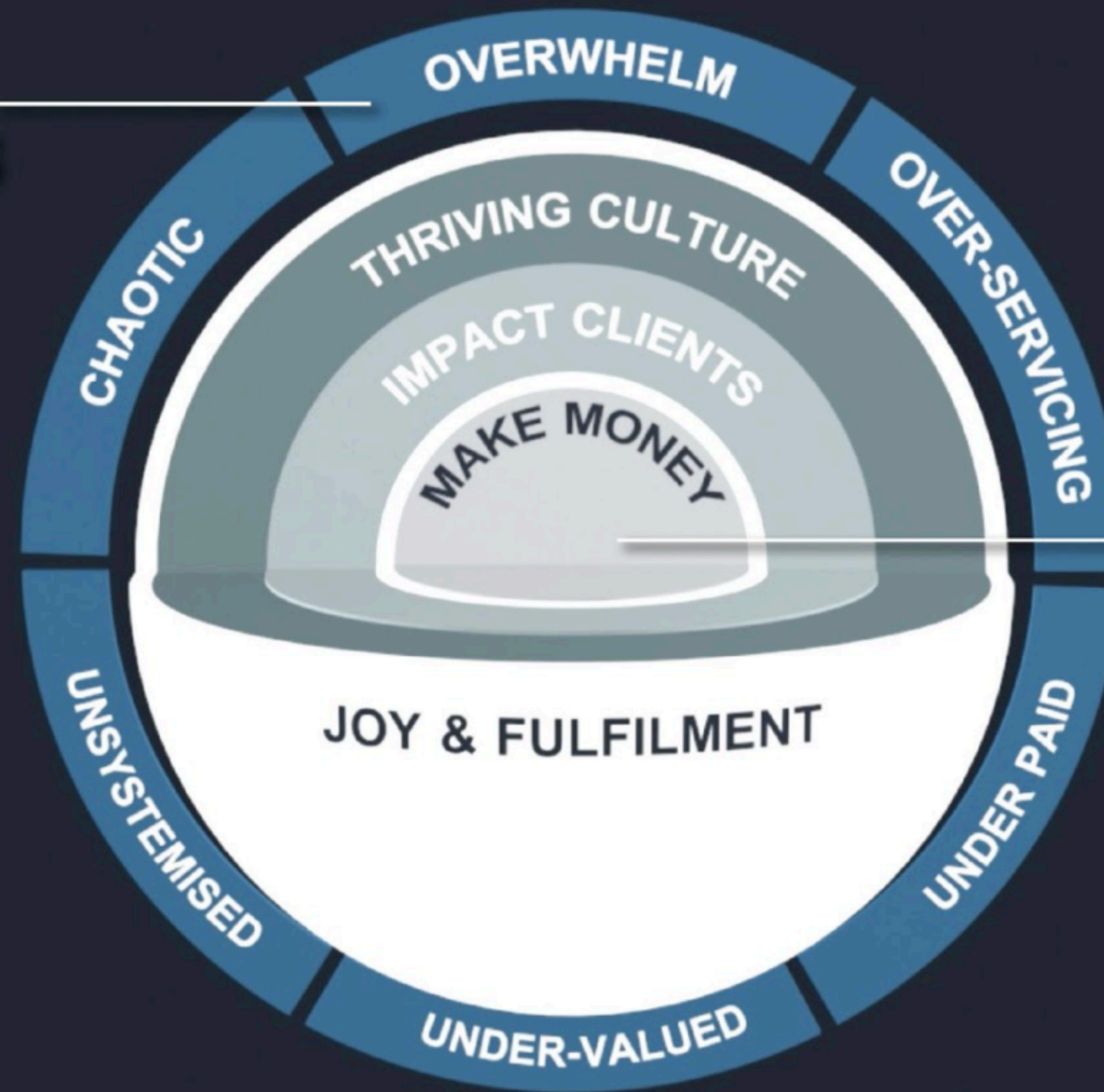
1. **Clients:** Impact clients.
2. **Employees:** Create thriving culture.
3. **Shareholders:** Make money.

## The order is wrong!

- Why? To serve.
- Function? Make money.
- Example? Healthy you.

“It’s never been about whether they can afford you.  
It’s always been about the time you can afford them.”

**SURFACE  
PROBLEMS**



**CORE  
PROBLEMS**

So what you must become an expert at, is communicating the value of what you provide to your clients, by providing well-articulated scopes, presented within professional proposals.

The reason you need a consistent pricing system is because you need something that can be improved. Pricing is never solved, it's only ever tuned. It's never perfected, only ever improved.

So what you must become an expert at, is communicating the value of what you provide to your clients, by providing well-articulated scopes, presented within professional proposals.

## **Scope of work**

The reason you need a consistent pricing system is because you need something that can be improved. Pricing is never solved, it's only ever tuned. It's never perfected, only ever improved.

## **Price to pay**

*“Version one is better than version none!”*

— James Ashford, GoProposal, CEO & Founder

**Balance > Optimize > Repeat**

**Apply the 1-3-12 rule.**

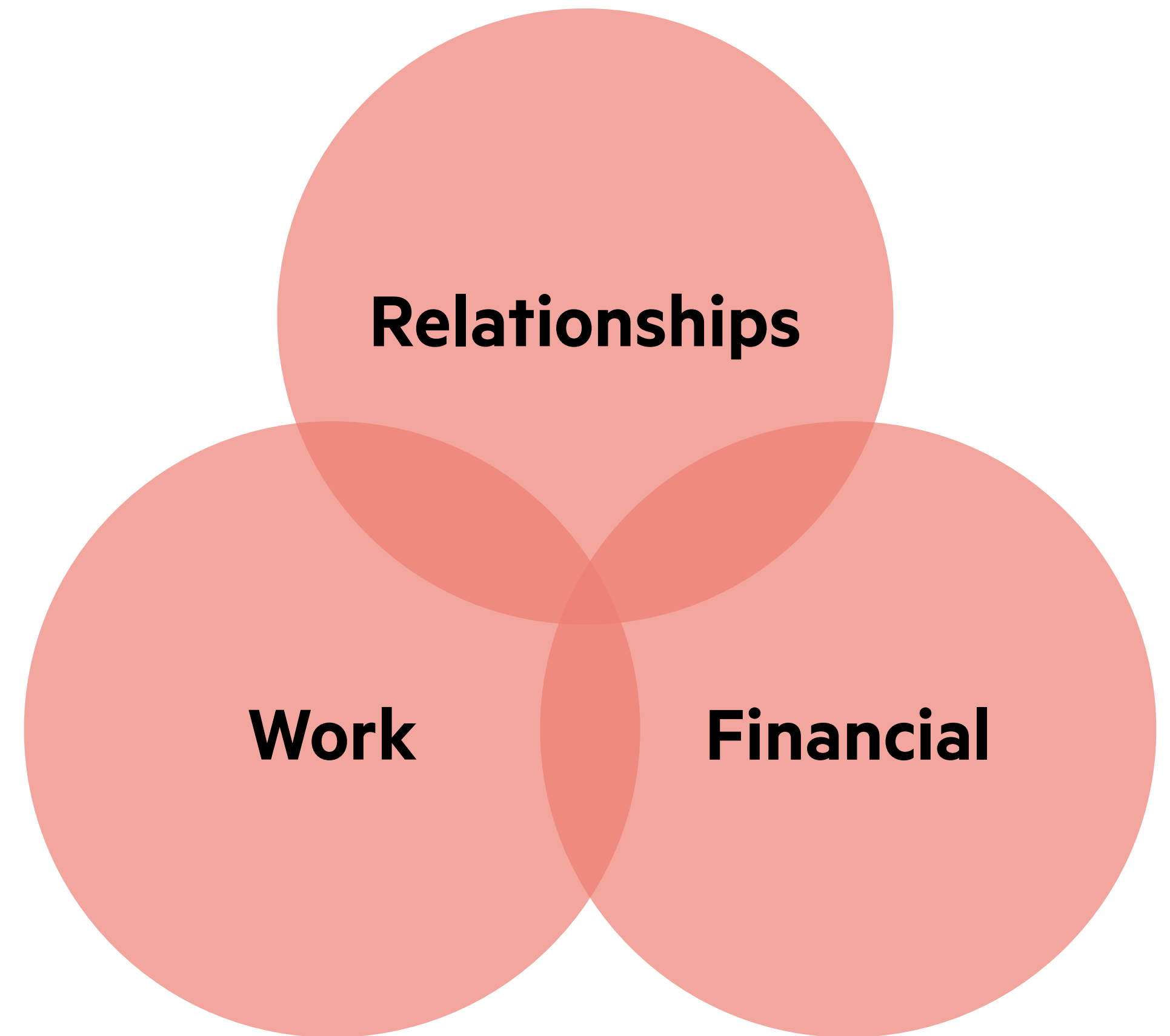
*“When you make the breakthrough,  
80% is psychology and 20% is strategy.”*

— James Ashford, GoProposal, CEO & Founder

# A systems view

- Attraction
- Nurture
- Sales
- Onboarding
- Delivery
- Finance
- Staffing

*The 7 systems*



*“For systems to work effectively, they need to include: a why, a checklist, a check for the checklist, and an improvement strategy.”*

# Why systemize?

- Control the chaos
- Franchise your practice
- Scale your practice
- Remove the overwhelm
- Reduce your vulnerability
- Maximize the value
- Sell your practice

# Why systemize?

- Control the chaos
- Franchise your practice
- Scale your practice
- Remove the overwhelm
- Reduce your vulnerability
- Maximize the value
- Sell your practice

## **The big one?**

Provide incredible experiences to your clients!

1. The why
2. The mindset
3. The effortless sales system
4. Key takeaways

*“To sell is to help people to make better decisions faster. It’s not about taking money from people.*

*Selling is about helping clients to feel confident in spending the money they need to invest in building a more financially sound business.”*

— James Ashford, GoProposal, CEO & Founder

**Change your thinking**  
**Prospects vs. existing clients**

**Change your approach**  
**Proposal vs. engagement letter**

# Address why you think selling is bad

- **Root:** Understand the real problem—clients can't decide what to do about *their* problem.
- **Fear:** Overcome your fear of rejection and fear of being judged.
- **Money:** See something from a different lens / perspective, to make a better decision.
- **Realization:** No value can be exchanged unless a sale is made.
- **Foundation:** Confidently sell your current services before embarking on new pursuits.
- **Approach:** Stop selling \_\_\_\_\_ services and instead, start selling certainty.
- **Confidence:** Gain total confidence in selling.

# 9 reasons you struggle to sell

- Too much talking. Not enough listening.
- Lack of positioning.
- Worry about other firms think.
- Fear of rejection.
- Never shown how to sell.
- No understanding of why people object.
- No sales system.
- You know them.
- You have a weakness somewhere else.



Let's focus on just a few to discuss today.

**Yes and no**

**They aren't as opposed as you may think.**

**Willingness to pay**  
**It has nothing to do with you.**

## **Role-play**

**Start by selling a client a cup of coffee.**

**What discount can I have?**

**“Absolutely none,  
but I don’t blame you for asking.”**

# 4 reasons why clients really say “No”

1. Lack of trust in themselves.
2. A lack of trust in you.
3. Lack of trust because you're too cheap.
4. Lack of trust in the outcome.

# 6 common objections to your services

1. “I can’t afford it.”
2. “It’s too expensive.”
3. “I don’t see the value of that.”
4. “I don’t have time.”
5. “I’ll stick with my current firm a bit longer.”
6. “We can do this ourselves.”

# 6 common objections to your services

1. I can't afford it.
2. It's too expensive.
3. I don't see the value of that.
4. I don't have time.
5. I'll stick with my current firm a bit longer.
6. We can do this ourselves.

## **Too expensive**

**The level of investment into their finance function should range anywhere between 2-4% of their revenue.**

*“Clients won’t necessarily see the value in what you’re offering, unless you present the full value of everything they really need from you.”*

— James Ashford, GoProposal, CEO & Founder

**DIY**

**“You’re right, it is possible that you can do this yourself.”**

# Scope and price

1. Agree on your service set.
2. Choose your price.
3. Use menu pricing.
4. Price on logic.
5. Avoid 3 tier (or value) pricing.
6. Don't charge on time.
7. Charge monthly.
8. Charge for everything.
9. Just start.

# Scope and price

## Choose your hard

Is it hard to charge high fees?

Is it hard to charge low fees?

Yes.

# Scope and price

## Choose your hard

Is it hard to charge high fees?

Is it hard to charge low fees?

Yes.

## Use menu pricing

It should be built on logical pricing methodologies, whose calculations sit behind the scenes.

# Scope and price

## Choose your hard

Is it hard to charge high fees?

Is it hard to charge low fees?

Yes.

## Use menu pricing

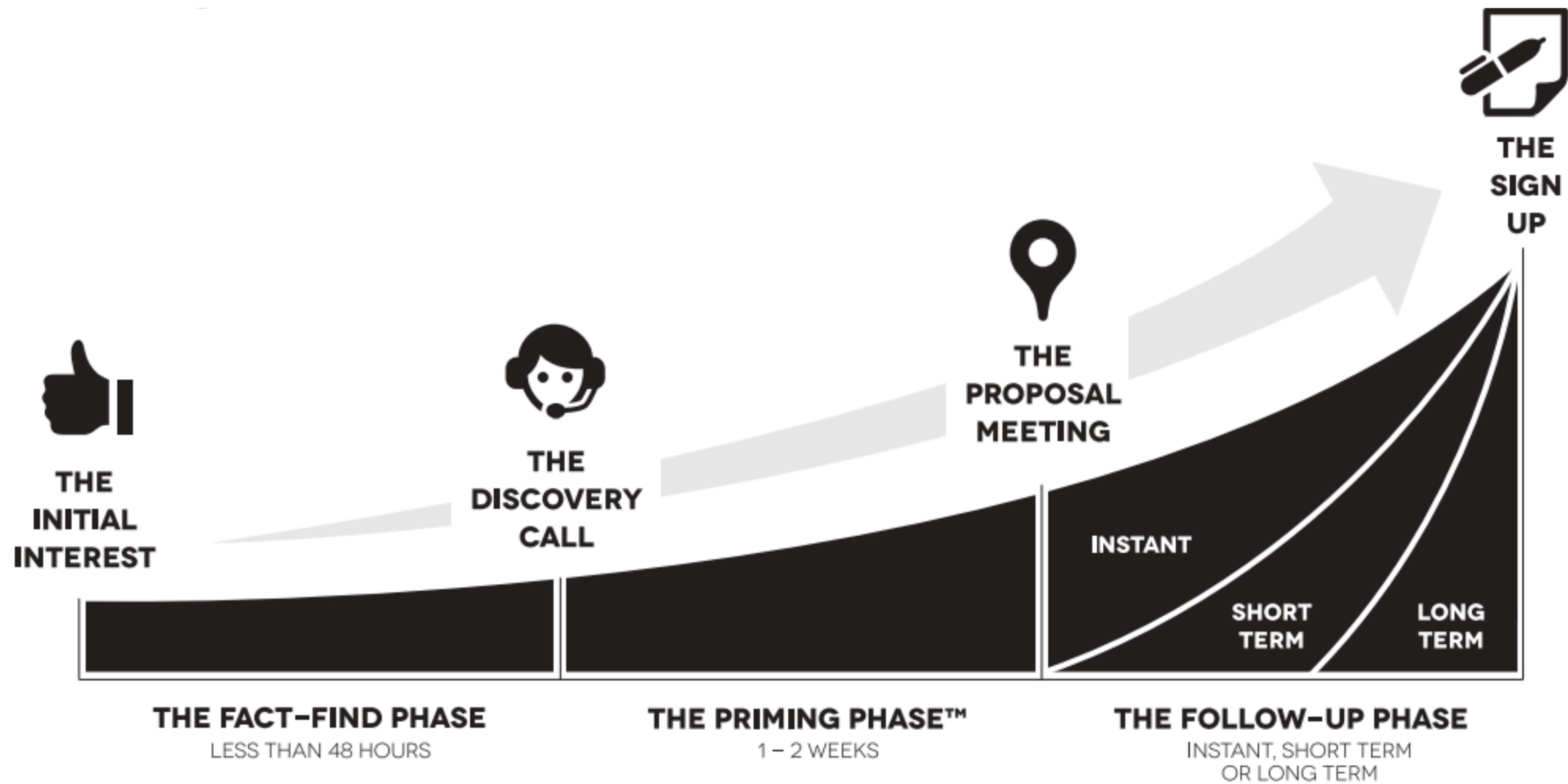
It should be built on logical pricing methodologies, whose calculations sit behind the scenes.

## Avoid 3 tier pricing

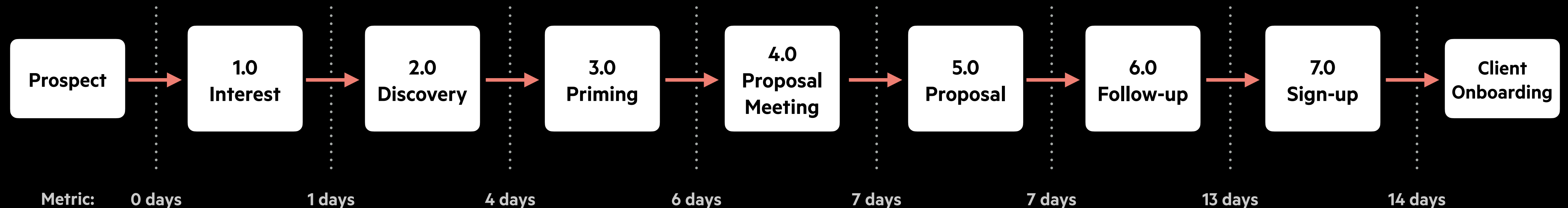
Understand when it works, but also on the many levels where it fails.

1. The why
2. The mindset
- 3. The effortless sales system**
4. Key takeaways

# The Sales Process Blueprint



# The Effortless Sales System



## Interest:

Capture contact details and instill confidence.

- Provide many routes.
- Respond immediately.
- Schedule discovery call.

## Discovery:

Ensure you're a good fit for each other.

- Set expectations.
- Gather key data.
- Confirm outcome.

## Priming:

Get the prospect ready to buy from you.

- Confirmation email.
- Priming video.
- Reminder email.

## Proposal Meeting:

Unlock the full value of the relationship.

- Wow when they arrive.
- Use the GLOSS agenda.
- Agree the fees together.

## Proposal:

Articulate that value professionally.

- Produce it instantly.
- Make it professional.
- Use cloud technology.

## Follow-up:

Ensure the client signs up.

- Immediate: Send video / email.
- Short-term: Send case-study.
- Long-term: Send valuable info.

## Sign-up:

Transition into onboarding.

- Enable swift sign-up.
- Capture payment & invoice.
- Welcome, capture & onboard.



# Get the template

A Karbon checklist template to set up, use and succeed using GoProposal's Effortless Sales System.



[karbonhq.com/resources/goproposal-sales-system](https://karbonhq.com/resources/goproposal-sales-system)

**FREE DOWNLOAD**

1. The why
2. The mindset
3. The effortless sales system
4. **Key takeaways**

# Key takeaways

- Selling is the most important skill you can develop.
- The fear of rejection will always be there.
- Your clients DO have money.
- You're not selling accounting services, you're selling certainty.
- You need to help your clients to make decisions.

*“Don’t look for the strategy to be laid out in front of you.  
In fact it is behind you. All that is in front are decisions.”*

— James Ashford, GoProposal, CEO & Founder

Charging high fees is hard.  
Charging low fees is hard.

Agreeing to a discount is hard.  
Saying no to discounting is hard.

Doing work for free is hard.  
Charging for everything you do is hard.

Allowing clients to do what they want is hard.  
Getting clients to do what you need them to is hard.

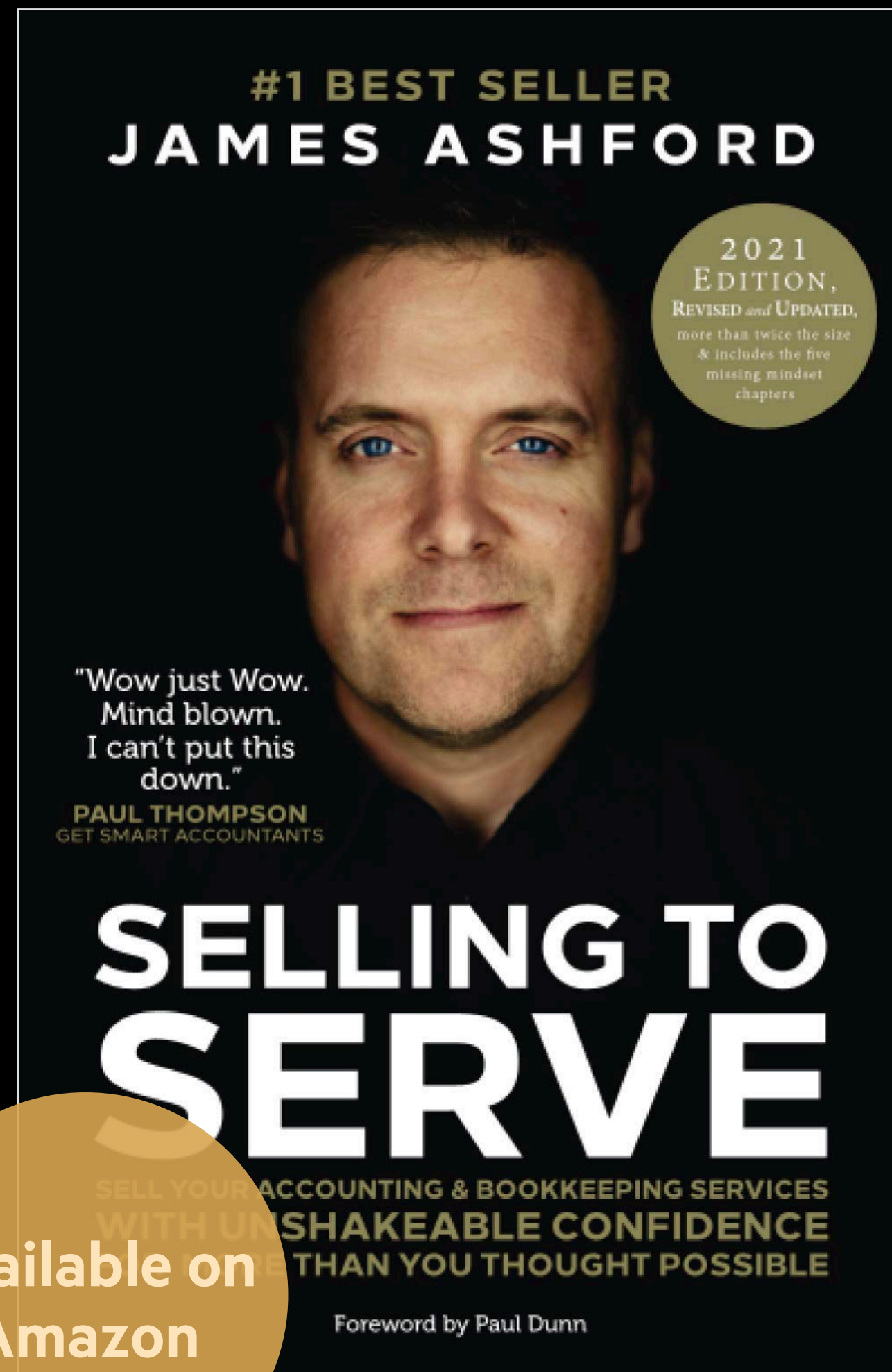
Running an accounting business will always be hard.  
But you can choose your hard.

**It's your choice.  
Choose wisely.**



**Wrap up**

- 1. The why**
- 2. The mindset**
- 3. The effortless sales system**
- 4. Key takeaways**



<https://amzn.to/3d1iFbU>



# Selling to Serve — Revised Edition

*The Breakthrough Sales System For Accountants*

- Is this really a bad client?  
[goproposal.com/bad](https://goproposal.com/bad)
- GLOSS method  
[goproposal.com/resources/gloss-method/](https://goproposal.com/resources/gloss-method/)
- The sales process blueprint  
[goproposal.com/blueprint](https://goproposal.com/blueprint)

# goproposal.com





[Help Center](#) [Academy](#) [Community](#) [Login ↗](#)

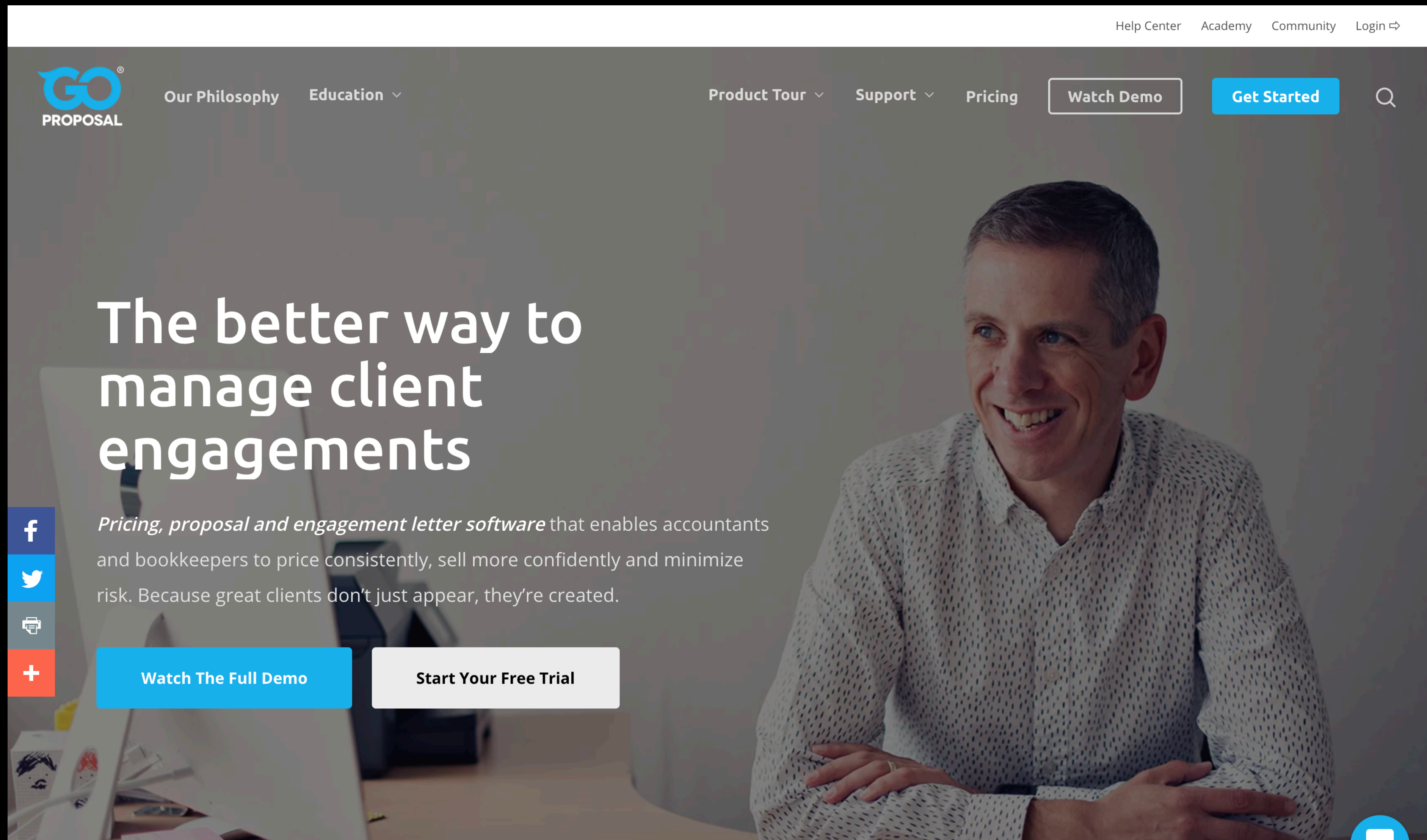
 [Our Philosophy](#) [Education ▾](#) [Product Tour ▾](#) [Support ▾](#) [Pricing](#) [Watch Demo](#) [Get Started](#) 

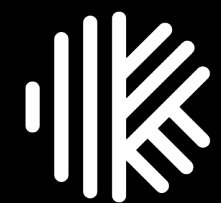
# The better way to manage client engagements

*Pricing, proposal and engagement letter software* that enables accountants and bookkeepers to price consistently, sell more confidently and minimize risk. Because great clients don't just appear, they're created.

[Watch The Full Demo](#) [Start Your Free Trial](#)

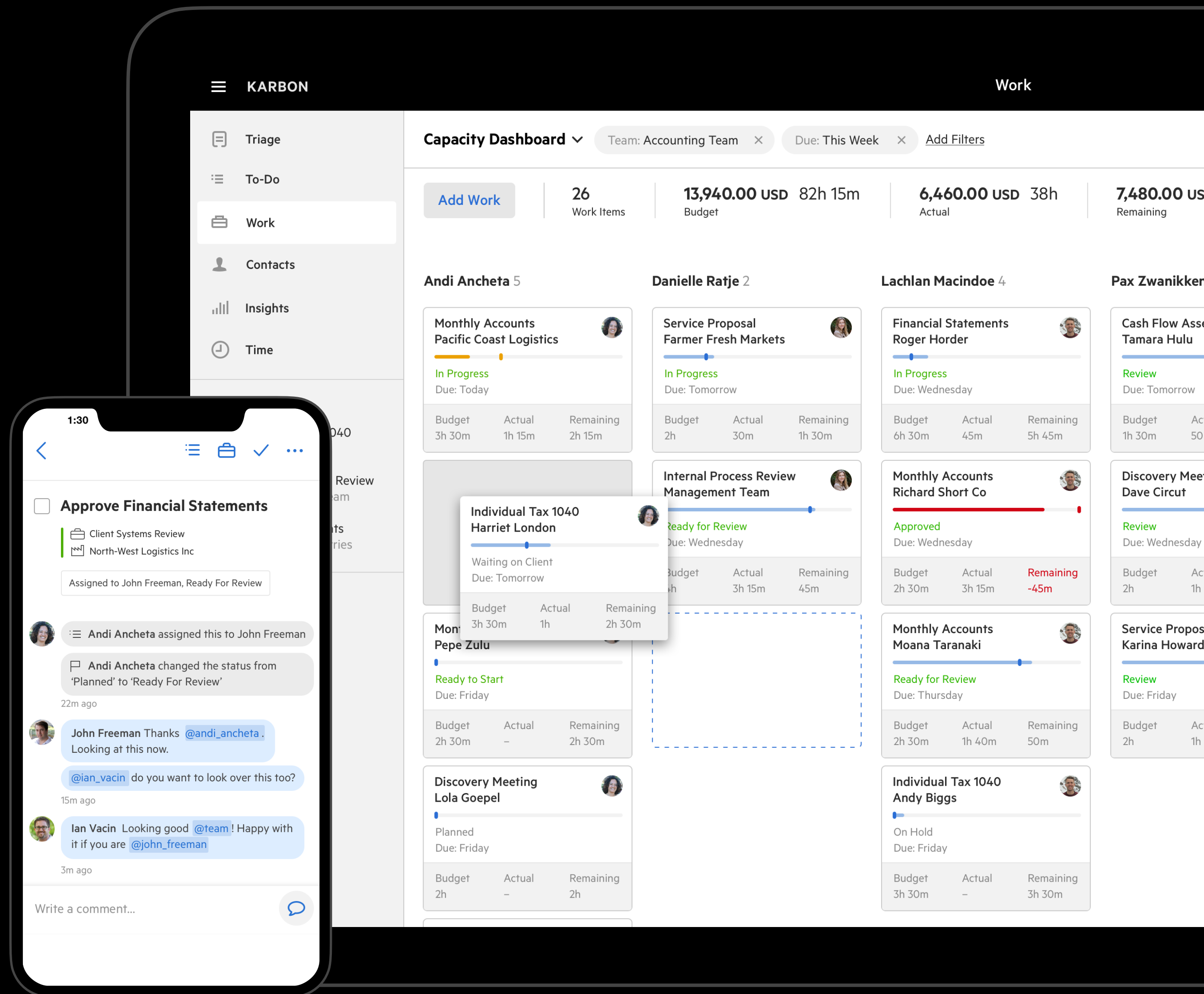




# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED

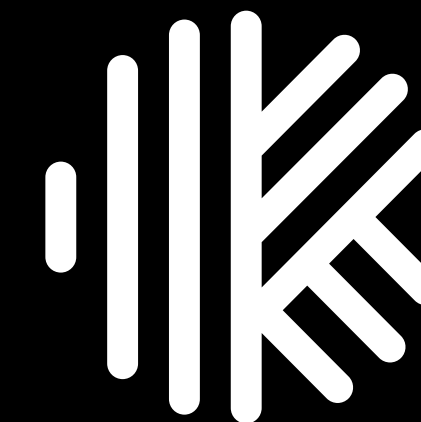


**Questions?**

**Thank you!**



goproposal.com  
@goproposal  
support@goproposal.com



karbonhq.com  
@KarbonHQ  
ian@karbonhq.com