

WHAT IS SASBA'S 5 STEP CPA REFERRAL MARKETING PLAN?

Let me ask you two questions...

1. How do you get new clients?

If your answer is “referrals,” you are among the 2/3 of other CPAs who have the same reply.

2. What is your referral plan or strategy?

When asked, virtually every CPA will give you a blank look. Did you do the same?

Finally, ask yourself this: Could this be the reason you wait around for referrals, unsure of when the next referral will come, or how to take a more proactive role in growing your business?

If you're ready to *grow your client base exponentially*, SASBA's 5 Step CPA Referral Marketing Plan is the solution you need to jumpstart your practice.

The marketing strategy we've put together is **a game plan to help you reach that end-goal of acquiring new clients**. Of all the methods by which a CPA might generate prospective clients or leads (referrals, telemarketing, New Clients Inc., the internet), we know that SASBA'S 5 Step CPA Referral Marketing Plan is THE best option.

There is no cost upfront. It's not complicated. **It's not a “wait and hope” program**. And best of all, you can start with your existing clients.

Enroll in SASBA's 5 Step CPA Referral Marketing Plan:

1. Unique Value Proposition
2. 90 Day Blueprint (to transform your clients into “an army of advocates”)
3. Read the book *The Referral of a Lifetime* by Tim Templeton
4. Finding your “bird dogs”
5. Working with your “bird dogs”

Let's start with Step 1, the Unique Value Proposition, or “UVP.” If you can't answer the following question, you are in dire need of what SASBA calls a “unique value proposition.”

...Why should a prospective client choose YOU over the CPA next door?

A “unique value proposition” is what sets you apart from your competition. **SASBA’s marketing strategy is designed with a built-in UVP** – the TakeCharge Solution, a program and online educational site which will help your clients take control of their personal finances in order to become debt-free.

The TakeCharge Solution offers 15 strategies for helping your clients redirect the money they’re currently wasting, one of which is SASBA’s Referral Business Program. The Referral Business Program is specifically about saving money on taxes.

As your clients’ “most trusted financial advisor,” you have an opportunity to help clients save money on their taxes (something they not only *want*, but *need*). Enter SASBA’s Referral Business Program.

This program enables clients to take certain tax deductions by converting what would normally be personal expenses into valid business deductions. In order to do so, they need a business (in other words something with a profit motive), and that’s their business of referring clients to you (which results in a referral fee they’ll receive for referring others to the program and to you, the CPA). This is the part where you grow your business exponentially.

This is what we call the “restaurant analogy” – you go to a new restaurant and the food is great, economically priced, there’s fantastic service and the restaurant has the best atmosphere. You’re going to tell everyone you know – friends, family, coworkers – about this restaurant. Your clients will do the same thing when they realize what you’ve done for them.

Let’s move on to Step 2, SASBA’s 90 Day Marketing Blueprint. This step in our marketing plan involves encouraging clients to join SASBA’s Referral Business Program, so that you might continue to grow your practice.

What’s your role?

It’s simple: When you provide SASBA with a list of your clients (who’d be interested in saving money on their taxes), we will execute our 90 Day Marketing Blueprint to inform and educate them about the Referral Business Program. And, therefore, assist you in transforming your clients into an army of advocates.

SASBA is committed to helping you every step of the way. Our marketing blueprint includes...

- Email / phone call templates for reaching out to existing and potential clients
- Tips for your initial consultation with clients
- “Work Your Bird Dog” seminar
- Additional tutorial videos

Step 3 is all you, Mr. CPA. Read “The Referral of a Lifetime,” and you’ll understand the remaining 2 steps in SASBA’s 5 Step Referral Marketing Plan.

Our marketing strategy is simple: **provide real value for your clients**. And in turn, watch your clients become advocates for your business. Clients that go above and beyond – actively promoting your practice and generating referrals – are what SASBA calls “bird dogs.” Only a small percentage of your client advocates will become standout “bird dogs” for your business.

Our objective with Steps 4 and 5 is to help you identify and work with 10-15 “bird dogs” to build a referral system which will provide you with a consistent flow of new clients.

Maybe you’re thinking... “Where do I sign up?!” In this last section, we’ll outline the two options that are available to you.

OPTION 1:

With this first option, you pay no upfront costs to participate in SASBA’s 5 Step Referral Marketing Plan. SASBA will front all the costs for your mentor. But for each of your clients that decides to join the Referral Business Program, you (Mr. CPA) will pay SASBA \$150. In this case, you’re paying SASBA only based upon the results of the program. Of course, you may select Option 2 at any time...

OPTION 2:

This is a one-time up-front cost of \$1,450, to pay for SASBA’s 2-day training, CPE credits, and to take advantage of SASBA’s cloud-accounting technology as well as SASBA’s marketing systems. In SASBA’s training seminar, you’ll be taught how to develop a “unique value proposition,” how to live up to your title of “most trusted financial advisor,” and how to receive the maximum results with SASBA’s 90-Day Blueprint.

Here’s our **guarantee**... at the end of a 2-year period, if you have not increased your practice gross receipts by at least double what you’ve paid SASBA, you will receive a full refund. In order to receive this refund, you must prove that you participated in the 90-Day Blueprint and did not see results.

Click here to join the 5-Step Plan *today*, and together, we will turn your clients into an army of advocates for your business.

If you’d like more information, click here to download the complete 10-page document detailing the 5-Step Referral Marketing Plan (a section of our Operation Manual). We also encourage you to visit our website sasba.org and to sign up for our emails. You’ll receive helpful tips and instructional videos to get you started.

If you’d prefer to speak to John Harrison himself, whether you have questions or would like to discuss your personal situation, click here to schedule a phone call.

Welcome, CPA! We’re excited to have you join us.