



Hi (first name - *make an effort to get this right and repeat it*)

Thanks for coming along today.

(pleasantries/relationship building)

(tell them about the meeting and how it will run)

Let's get into it! I like to ask you a bunch of questions at the start so I can get a feel for what you guys do, where you're at, what you might need help with and the best way we can help. And of course, you can ask me questions at any point.

	Layering and Probing	Quantifying	Examples
General	<ul style="list-style-type: none">• Give me a little background to your business• What made you book this meeting? / What would you like to get from this meeting?• How did you hear about us?	<ul style="list-style-type: none">• What are the steps in your decision making process for this project?	
Current system	<ul style="list-style-type: none">• Tell me about your current finance system. How does that work for you?• How is it going with your current accountant/bookkeeper/financial planner?• What don't you like about your current setup/provider?• What's the biggest challenge you're facing in your business at the moment?• Tell me the key elements you'd like to see in a financial solution?	What technology/software pieces do you use?	
Ideal	<ul style="list-style-type: none">• What is the impact of that challenge?	<ul style="list-style-type: none">• What results are you looking for?	<ul style="list-style-type: none">• What has worked for you in the past?



	<ul style="list-style-type: none">• In an ideal world, what would you like to happen? If you could wave a magic wand...• What would you like to see in an ideal accounting solution?• Tell me about your current finance setup. (people, software and tools, suppliers, training etc.)	<ul style="list-style-type: none">• What does success look like for you?<ul style="list-style-type: none">◦ Quantify that	<ul style="list-style-type: none">• Give me an example of...
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Questions to ask

General

- Tell me about your business / Please give me a little background to your business
- Tell me about your target/ideal clients
- What would you like to get out of this meeting today? What made you book this meeting

Current Situation

- What are you currently doing?
 - How successful has that been? / How is that working/performing for you?
- Tell me about your current finance system.
 - How is that working for you?
- How is it going with your current accountant/bookkeeper/financial planner?
- Where does your growth come from?

Problem

- What don't you like about your current setup/provider?
- What's the biggest challenge you're facing in your business at the moment?
 - What else?
- What has motivated you to book this meeting?



Impact

- What's the impact of that challenge?
- Why is that?
- What would you like to change?

Ideal

- Ideally, how would you have it?
- In an ideal world, what would you like to happen?
- If you could wave a magic wand...
- What would you like to see in an ideal accounting solution?
- What are your priorities with this project?

Benefit

- What are the benefits of that?
- How would you benefit from ...?
- Why is that important to you? / Why is that?

Goals / Results

- What are your goals with this project?
- What would success look like to you?
 - How would you quantify that? eg grow by x per year

Niche

- *If you operate in a niche, ask some specific questions as well*

Final

- How did you hear about us?



After the questions, then you can talk more about your firm and how you can help.

Agree the follow up

- I'll send you through a proposal today based on what we talked about. Normally there are a few questions after the proposal, so let's get another call booked in to chat (usually x minutes). What do you have available this time next week?