



Improving the Proposal Process at Your Firm

**STOP
the Fire Drills!**



Presented to IAPA International
by Lisa Tierney, CLSC, President of
TIERNEY Coaching & Consulting, Inc.





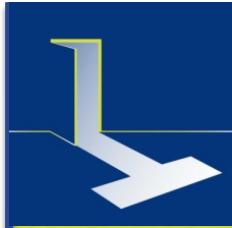
Lisa Tierney, CLSC

- Former Chairperson, Membership Satisfaction Committee at the national Association for Accounting Marketing
- Former President and Vice President of the Philadelphia Chapter of the Association for Accounting Marketing
- Panelist for the CPA Leadership Institute / Best Practices Network
- Former Chairperson of the Marketing Committee of BKR International (a network of over 140 CPA firms worldwide)
- 2009 - received certification in coaching - addressing the personal, professional and business connection of MIND, BODY and SPIRIT



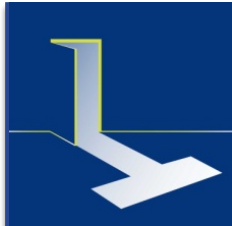
Lisa Tierney, CLSC

- Increased visibility of practice areas through targeted multi-faceted marketing campaigns (i.e. 75-person CPA firm with **revenue growth averaging 8% for three years in a row**)
- Growing a CPA firm's niche area (forensic accounting and litigation support services group) from a **one-person, \$650k practice to a five-member group which netted \$2.5 in new business annually**
- Leading the efforts to increase (quadruple) a 13-partner CPA Firm's publicly-held clientele in two and a half years resulting in an **increased revenue of over \$420k annually**
- Motivating CPAs with tailored individual marketing plans (i.e. regional firm **increased practice development hours for senior staff** ranging from 6% to 18% in 2008)
- Launching one of the first ever **electronic (pay-per-click) marketing campaigns** which promoted a CPA firm's business valuation practice area – the first year it returned a **600+% return on investment**; the second year 400+% (I won an award for that one from the Association for Accounting Marketing)

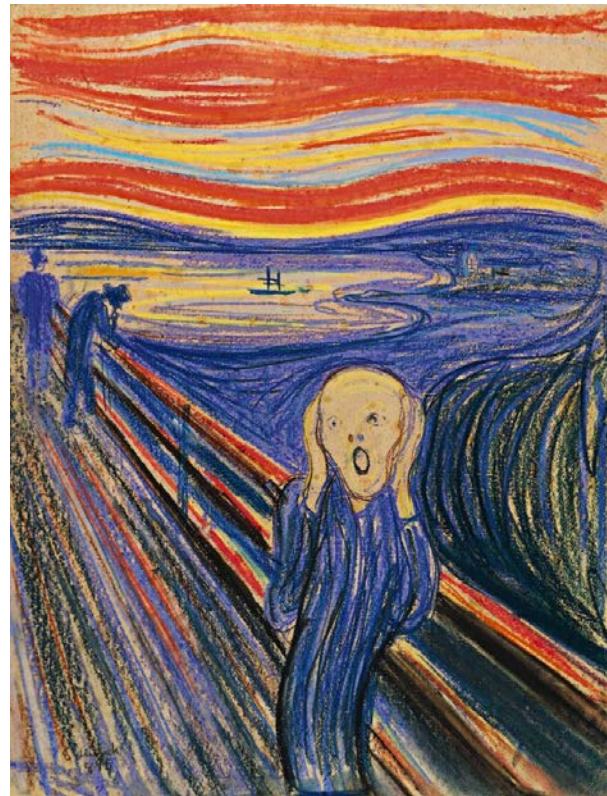


Agenda

- Securing prospective clients
- Solidifying your connection with decision-makers
- Top 10 areas of focus to woo the decision makers



Is This You?




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Preparation



By applying
mindfulness
to all we do -
we ensure our
success

-Lisa Tierney



The Proposal Process Checklist

1. Conduct an Interview
2. Determine the Process
3. Internally Communicate
4. Leverage Relationships
5. Research
6. The Engagement Team
7. Pre-Meeting
8. Post-Meeting
9. Deliverable
10. Follow-Up



Interview



Ask questions



The Process

What is their
decision-making
process?





Internally Communicate

Make sure
professional staff
know about the
opportunity





Leverage Relationships

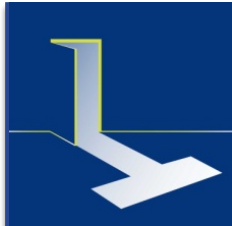


Who do you
know that they
know?

Research

Learn everything
you can about the
company and the
key players





Brainstorm



Talk about selecting the engagement team

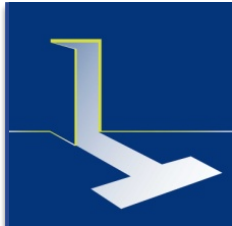


Pre-Meeting

Determine team member roles to address the needs identified by your prospect during the interview

Hello
my name is

*Team
Leader*



Post-Meeting



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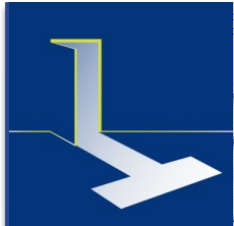




Final Look

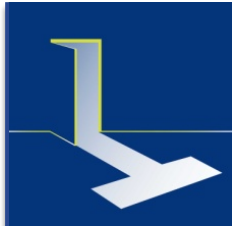
- Who
- What
- When
- Where
- Why





Thank You

What if....?



Thank You

QUESTIONS?



Contact Us

To get a copy of our questions to ask
“cheat sheet”

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