



# Sample sales cadence to sell advisory services

Not sure how to go about selling advisory services to clients? Here's a step-by-step guide to help you out, along with a few email templates for you to use.

## 1 Initial outreach

Set up a meeting to discuss your client's financial goals and how you can help them achieve these through management reporting, forecasting, and other advisory services.

## 2 Discovery meeting

Gather information about the client's business, financial objectives, pain points, and challenges. Explain how you can help them make informed decisions and drive growth. Perhaps give an (anonymous) example of another client who you were able to help with these services.

## 3 Proposal

Prepare a proposal outlining the specific management reporting and forecasting services you will provide and the expected outcomes. This proposal should be tailored to the client's specific needs and goals.

## 4 Follow-up

Follow up with the client to answer any questions they may have about the proposal and address any concerns. You can also discuss how you will work together to implement the services and establish appropriate timelines.

## 5 Implementation

Once the client has signed the agreement, begin implementing the new services. Provide regular updates and progress reports to the client and use this as an opportunity to discuss insights and make recommendations.

## 6 Ongoing communication

Regularly communicate with the client to discuss performance, review management reports, and make adjustments as needed. Provide ongoing support and advisory services to help the client achieve their financial goals.

## 7 Upselling and cross-selling

As the client's business grows and their needs change, identify opportunities to upsell or cross-sell additional advisory services, such as budgeting, risk management, or financial planning.



## Email templates

Here are a few email templates to help you approach your clients. Feel free to use these as a base and edit or adjust them as you see fit.



### Please note

Every client is unique, and the sales cadence should be customized to meet their specific needs and goals. By demonstrating your expertise and providing value through management reporting and forecasting services, you can position yourself as a trusted advisor and help your clients achieve long-term success.

### Initial outreach email:

**Subject: Helping you make better financial decisions**

Dear/Hi *[Client Name]*,

I hope this email finds you well. As your accountant, I have been thinking about ways to help you achieve your business goals and grow your company. One way I can do this is by providing you with management reporting and forecasting services.

With management reporting and forecasting, you can get a clear picture of your business finances, make informed decisions, and plan for the future. I have worked with many clients in similar situations, and I have seen how these services can help them improve their financial performance.

I would love to discuss these services with you in more detail and show you how they can benefit your business. Please let me know if you are available for a call or meeting in the next week or so.

Thank you, and I look forward to speaking with you soon.

Kind regards,  
*[Your Name]*

## Follow-up email after discovery meeting:

**Subject: Follow-up on our meeting**

Dear/Hi *[Client Name]*,

Thank you for taking the time to meet with me yesterday to discuss your business goals and challenges. It was great to learn more about your company and how you operate.

Based on our conversation, I believe that management reporting and forecasting services could be highly beneficial for your business. By having access to accurate financial data and projections, you can make more informed decisions and plan for the future.

As discussed, I have put together a proposal outlining the specific services that I can provide and the expected outcomes. Please let me know if you have any questions or concerns about the proposal, or if you would like to schedule another call or meeting to discuss it further.

Thank you again for your time, and I look forward to hearing from you soon.

Kind regards,  
*[Your Name]*



Remember to attach the proposal document to this email

## Follow-up email after proposal acceptance:

**Subject: Next steps for management reporting and forecasting services**

Dear/Hi *[Client Name]*,

I am thrilled to have the opportunity to work with you and provide you with management reporting and forecasting services. I believe that these services will help you make better financial decisions and achieve your business goals.

As discussed, we will begin implementing the services on *[start date]*, and I will provide you with regular updates and progress reports. I will also be available to answer any questions or concerns you may have throughout the process.

Please let me know if you need anything from me in the meantime, or if you would like to schedule a call or meeting to discuss the implementation in more detail.

Thank you again for your trust and confidence in me. I am excited to work with you and help you achieve success.

Kind regards,  
*[Your Name]*