ACQUIRING NEW CLIENTS

Module 5: Client Acquisition and Retention

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Acquiring New Clients

Welcome to the Acquiring New Clients Workbook. This workbook is designed to help you develop a focused, practical strategy for attracting high-quality leads, converting them into long-term clients, and delivering a seamless onboarding experience.

By working through the tasks and exercises in this workbook, you'll generate new ideas, define your client acquisition funnel, and build a repeatable plan for growth that aligns with your firm's goals.

Instructions

1. Identify Growth Opportunities: Start by defining your ideal clients and exploring new sectors, services, or marketing channels. Think beyond what you're already doing—where could you grow next, and how can you reach that audience effectively?

2. Build a Lead Generation Plan: You'll be prompted to create lead magnets, content campaigns, and referral strategies designed to attract the right prospects. The focus here is creativity, clarity, and alignment with your brand positioning.

3. Optimise Lead Conversion: Explore new ways to convert leads—from CTAs and objection handling to value-based messaging and fast-start offers. Use this section to refine your funnel and remove friction from the decision-making process.

4. Structure a Strong Onboarding Process: A good first impression leads to long-term loyalty. In this section, you'll plan your onboarding communications, early deliverables, and internal handovers to ensure a consistent and professional start for every client.

5. Set Measurable Goals: Define specific, measurable, and realistic targets for acquiring and onboarding clients—whether that's number of leads, conversion rates, or client satisfaction metrics.

6. Implement and Review: This workbook is not just for planning—it's for doing. Commit to timelines, assign responsibilities, and review your progress regularly to adjust and improve your approach.

This structured workbook will help you transform client acquisition from a reactive process into a proactive, scalable growth strategy—so your firm doesn't just win more clients, but wins the right ones.

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Section 1: Lead Generation

Define a New Niche: List new industries or client segments you want to target. What problems do they face that your firm can solve?

Plan a Lead Magnet: What downloadable resource (guide, calculator, checklist) could you create to attract these audiences?

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Identify 3 New Referral or Event Opportunities: Name 3 businesses or industry events where your ideal clients already go. How can you connect or collaborate?

Design a 3-Post Social Campaign: Outline three LinkedIn or Instagram posts that would attract your ideal client. Include the hook, value, and call-to-action for each.

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Map Your Funnel Content: For each stage—Awareness, Consideration, Decision—list pieces of content or offer you could create.

Segment Your Leads: Create lead categories (e.g. sole traders, growth-phase SMEs, high-income professionals). What would you say differently to each? What are each of them looking for in an accountant?

Section 2: Lead Conversion

Draft 3 CTAs: Write three call-to-actions matched to different client stages (e.g. "Download Guide," "Book a Demo," "Request Proposal").

Develop Objection Handlers: List your most common objections. Next to each, write a clear and confident response or solution.

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Build a Value Matrix: List 3 key services. For each, write what problem it solves, why it matters, and how it compares to competitor offerings.

Build a Demo Walkthrough or "What to Expect" Guide: Sketch out a visual or written step-by-step of what a new client can expect in their first 90 days—useful as a pre-sign-up asset.

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Create a Tiered Pricing Menu or Service Bundles: Draft 2–3 package options (e.g. Starter, Growth, Advisory) to make decisions easier for price-sensitive leads.

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Draft a Script for Discovery Calls: Create a simple call structure:
→ Rapport & goal
→ Understand their pain points
→ Explain your process
→ Confirm fit
→ Discuss next steps or objections

Section 3: Onboarding

Outline a 30-Day Client Plan: What are the first three deliverables or checkpoints a new client should expect? Brainstorm everything you and your client will need to happen in the first 30 days.

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Create a Kick-Off Meeting Agenda: Bullet-point the agenda for your first client meeting. What must be covered to ensure clarity?

List 3 Onboarding Improvements: What manual or delayed steps in onboarding could be automated, removed, or simplified?

Develop a Feedback Touchpoint: Draft a short message or form to ask for onboarding feedback after the first month. What 2–3 questions would you ask?

Design a Client Welcome Pack: List the 5 things your welcome pack should include (e.g. intro to team, key dates, portal login, FAQ).

Outline a Client Communication Policy: Define how often you'll update new clients, through what channels, and what they should expect in terms of response times.

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Congratulations on Completing the Acquiring New Clients Workbook!

You've laid the groundwork for growing your firm—not just by generating interest, but by converting the right leads and delivering an onboarding experience that builds long-term trust.

Here's What to Do Next

1. **Finalise Your Lead Conversion Framework:** Review the CTAs, objection handlers, value messaging, and service packages you developed. Choose the strategies with the greatest potential and integrate them into your client journey—website, email flows, discovery calls, and proposals. Focus on clarity, speed, and alignment with client needs.
2. **Strengthen Your Onboarding Process:** Select 2–3 onboarding improvements you identified—such as a new welcome pack, kick-off call template, or clearer 30-day deliverables—and implement them now. Early impressions shape long-term retention, so ensure the first 90 days are clear, consistent, and confidence-building.
3. **Set Conversion & Onboarding Metrics:** Define what success looks like. Track these metrics monthly to identify where drop-offs occur and where your process is working best. Examples:
    a. Increase proposal-to-sign-up rate by 20% in 3 months
    b. Reduce onboarding time from sign-up to full setup to under 7 days
    c. Collect feedback from 80% of new clients within the first month
4. **Integrate & Automate Where Possible:** Choose 1–2 follow-up emails, forms, or touchpoints to automate via your CRM or email tool. This helps maintain consistency in follow-ups and ensures no lead or new client slips through the cracks.
5. **Schedule a 90-Day Review:** Mark your calendar. Revisit this workbook in 90 days to assess:
    a. Which conversion strategies performed best?
    b. Was onboarding smooth, timely, and well-received?
    c. Where are further improvements needed?

Final Thoughts

Attracting leads is only half the journey. Converting them—confidently and consistently—and onboarding them with care is what builds a stable, scalable practice. The systems and strategies you've outlined here are not just theoretical. They're now your toolkit for turning interest into engagement, and prospects into long-term clients.

Join the Unstoppable Newsletter for more updates, tips and content to learn how to start, build and scale your accountancy firm.

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Additional Notes

Please use this section to fill in the most important points and any other notes or ideas you have about your Growth Action Plan.