

THE ACCOUNTANT'S COMPLETE GUIDE TO NEW BUSINESS

**How to get all you can out of everything
you've got and attract more of the same...
with less effort and less cost.**



TREVOR MARCHANT BBus & EVE DALLAS



The ONLY NEW BUSINESS GUIDE YOU'LL EVER NEED



“

It does not matter how slowly
you go as long as you
do not stop.—

”

Confucious

Why Accountants are telling you to read this publication...

“Historically, training of professionals to win new clients has been haphazard. Law, accounting, engineering, medical, and architectural schools teach nothing about selling.

This is also true of most business schools, surprisingly so, given that a sale is what defines the existence of a business.

Many firms offer in-house education on technical issues, and almost all provide such training on the job, but marketing and sales training is spotty. Most of us learn by trial and error.”

-Ford Harding, *Rain Making*

...well, that can change – in a heartbeat. This publication will show you WHY over 500 Accountants have chosen the SALES factor course for Professional People over the last 3 years.

-John Kerrisk CA - Mclean Partners , Townsville QLD

I thought I'd start with this and for those who know me – I'm sure you will not be surprised.

One of my mentors – over many years – is Michael Masterson.

(Michael for those who don't know him has helped start and develop dozens of multi-million-dollar businesses, including one whose revenues exceeded \$135 million and another still growing at \$300 million. My favourite book of his is READY, FIRE, AIM – Zero to \$100 million in no time flat.)

He makes the point on the opening pages of his book that 'without sales, it is very hard to sustain an ongoing business.'

No argument from me there – and I guess none from you as well.

To illustrate the point, he shares an essay written by Jim Koch, founder and CEO of The Boston Beer Company – another good place to start: 😊

'Years ago, when the Boston Beer Company was getting up and running, I received a phone call from my uncle, a partner at Goldman, Sachs and one of my initial financial backers. He asked me how things were going. Fine, I replied. The first batch of Samuel Adams beer was in the aging tanks and would be ready for delivery in about five weeks.

"So," my uncle continued, "what did you do today?"

I told him I'd spent the day shopping for a computer system. When he asked me why, I explained that I figured I'd need a computer to keep track of sales, payable, and the like.

"Oh yeah" he said, "Sales. By the way have you got any?" I admitted that I did not.

"So, what the hell are you doing buying a computer?" he demanded. "You know Jim, I've seen a lot more businesses go broke because they didn't have enough sales than I've seen go under from lack of computers. Why don't you work on first things first?"

That shook me up. My uncle went on to describe his early days at the firm- how frightened he had been then to have made cold calls on potential customers, how he had forced himself to set a quota of at least one new account a week, no matter how many calls it took. Listening to him I realised that somehow I had gotten the whole process backward. To make my business viable, the first thing I needed was not a computer. It wasn't even an office or a desk.

What I needed was a customer.*

That call really galvanised me...I was determined to follow my uncle's example and go for one account a week...but when the morning came to go out and do it, I didn't want to get out of bed.

Finally, I picked a bar near my office ...and, wearing my usual dark, pin-striped suit, walked in with six bottles of Samuel Adams beer in my briefcase and a lump in my throat.

There was a guy behind the bar I assumed was the bartender.

As it turned out, not only was he the bar back(the guy who stacks glasses, keeps the shelves filled, and so on), but he didn't speak English. He looked at me as if I had two heads. While I stood there talking about my beer, the manager walked over and eyed me suspiciously – he probably thought I was from the IRS or something.

Anyway, I went through my story one more time and asked if I could pour him a glassful. He looked at my beer, sniffed it, drank it – and immediately gave me an order for 25 cases. It was an amazing feeling.

In the space of 10 minutes, I went from sheer terror to ecstasy.

When I got home that evening, the vision in my head was that it's really selling the drives most businesses: the direct interface between the product and customer, the crucial feedback loop.

*

Peter Drucker, perhaps the doyen of authorities on business once said that the purpose of business is “to create a customer.”

Reading this essay reminded me of an experience I had with a large group of accountants at a conference (Jupiters – The Gold Coast - 2011 – run by Smithink – who became a client of mine)

They gave me 30 minutes to talk about the importance of selling. Afterward, six accountants from different firms and came up and congratulated me. They all said – everyone really enjoyed the talk and they gave me their business cards and asked me to call them. Most of them also said they thought selling was an unpleasant, even a deplorable activity – but now they will have to re-think their position on that.

That was my BIG start working with Accounting Firms .

This publication is about NEW business. New business from existing clients and New business from new clients.

So, before this gets away on us it's important for you to note – down to your bones – that new business doesn't happen without some form of selling.

Learning ‘how to sell’ – embracing it, enjoying it, knowing that nothing happens until something is sold and being prepared, like me, to say you can always learn something new and do things better is the constant theme running through this publication – from top to bottom.

The Sales Paradox

“ When I stop trying to get what I want and start helping people get what they want – I start getting what I want. ”



“ You can get anything in life you want if you help enough people get what they want ” – Zig Ziglar (1926-2012)

The SALES factor

"It's subtle...could almost say it's hidden in the text for you to find...but I feel I should at least give you a hint..."

When you sell something you also buy something. When you sell your services you are 'buying' a client ...you are buying 'a payment' for your services.

Would you prefer to sell something or buy something? Most people say they would rather buy. For me it's all the same.

However, if selling doesn't excite you then start buying instead.

For example: Instead of selling your services to a new client ...BECOME their Assistant -Buyer and see 'everything' including you, your firm, your team and your services – from their perspective.

Would you buy from you? How would you buy from you? Start selling the way your clients like to buy...

I actually think – although it has never bothered me – we should take the word 'sell' out of the equation – at least for a moment.

Based on what I've discovered training and coaching Accounting Firms over the last 30 years when it comes to Advisory Services – I think you have to help clients buy them.

Clients have problems and they need help in discovering, understanding and tackling them. Once people realise you helped them solve problems, they will come back."

-Trevor K J Marchant BBus – Marchant Dallas Consulting .



A BUSINESS PHILOSOPHY by **Eve Dallas**

“Life is tough, so you better get a helmet.”

Whatever you want, you are your own biggest obstacle to it.

That’s because life doesn’t care about intentions or goodwill. It only cares about action.

It only cares about “So what now?”

That’s the harsh reality you will learn to defeat – when you embrace the ideas in this publication.

That’s Evolution.

This Publication is as much about Evolution as anything else...

We call it The Evolution factor. It’s about development, growth, progression, expansion, change, advancement and transformation...and how accountants (the trusted advisors of the financial world) ‘sell’ their services and gain new business.

If I had to pick one word to describe what this transformation is about – it would be

tenacity. But I can’t pick tenacity with picking patience. You need them both.

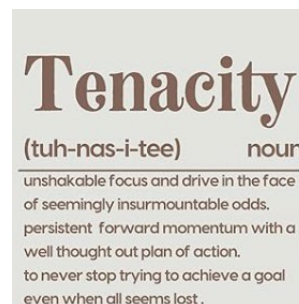
Tenacity is determined persistence and not giving up in the face of difficulty, obstacles, or opposition.

It involves sticking to a goal despite challenges, demonstrating courage, fortitude, and mental strength.

It’s about having a goal then doing whatever it takes – no matter what – to achieve it.

But it’s not about being reckless or putting yourself under so much pressure that it affects your health and overall well-being.

It’s not necessarily about a rigid timeframe either ... it is about achievement and it’s about **patience.**





“From me to you”

I’m going to do my best to ‘sell’ you an idea...

I’m going to try and sell you on the key points discussed in this publication.

It is my wish that you embrace the material, accept it, learn it, apply it, enjoy it and benefit from it.

If you do – I can make you a promise...and that is unusual for me because I don’t usually make promises when it comes to business.

The promise: The material will change your life for the better. It will transform you. You will become the NEW you – in terms of how you think and act when it comes to new business.

...and you will have a system, a method, you can replicate and scale whenever you decide you want to increase your revenue from new clients and new business from existing clients.

On the flip side, and I say this with knowing if there **isn’t** a problem in terms of you knowing what to do to get new business and if there **isn’t** a gap between where you are now and where you want to be in terms of you getting new business – then my chances of selling you this idea will diminish – rapidly.

No problem – no sale. No gap – no sale

But, if you are reading this publication then I’m guessing you are half-interested in looking at new ways to gain new business which gives me *half – a – green – light* to move forward.

When I ask accountants what their biggest challenge is when it comes to getting new business – three ideas tend to emerge:

1. Not sure how
2. Not enough time and
3. Capacity issues

So, the ideas I want to present in this publication is ‘how to do it’ and how you simply integrate it; merge it, with what you’re doing now. In other words, ‘let’s not make a big thing out of this ...let’s just build it into the way you work...your culture...the way you do things around here.’

Let it be a natural process.

It’s a bit like -

“Yeah, we’re busy but we can always do with one more client...or yeah, we’re busy but we could always do with some extra work from the clients we’ve got.”

As you read through this publication you will begin to see and feel what it takes to firstly prepare yourself, your team and your firm to ‘do what is obvious and what comes natural and in the client’s best interest’ to get new business and secondly I’ll show you (and coach you) how to do it...what to say, when to say and to whom.

But that’s just the beginning ...all the preparation, learning, knowledge, skill, and know-how –will be of little use if you don’t do it. If you don’t put it into practice.

I want to sell you on the idea and importance of always be looking for new business; I want to sell you on the idea of no excuses and doing whatever it takes because we can all make excuses and we can all make money – but we can’t do both and I want to sell you on the idea of taking action – massive action.

I’d like to take this one step further and say to you “ if all you do is read this or glance through it and take no action then it’s probably a waste of your time. You might pick up a few ideas ...that could be helpful but if you don’t embrace the material, accept it, learn it and apply it then in a few weeks the ideas will vanish from your mind ‘like a shadow in the night.’

So, for me it’s



...and if it’s the same for you I will support you to the ‘hilt’ and do whatever it takes to help you make it happen.

There's a common thread that runs through those few Accounting firms who are just bursting out the top - all the time.

They're meeting and exceeding goals.

They're realising their visions and aspirations.

They're always over and above expectations....and these robust, energised, continually successful firms seem to have a secret. And frankly, we have studied it, we have gone to school, we have consulted, we've done everything we can to find the formula that says –

“We will be one of these Accounting firms in this very small, select group that achieves perpetual success.”

The secret, the clue, the common thread is- **3 fold.**

FIRSTLY, IT IS HOW YOU TREAT PEOPLE.

It's how you treat your fellow man, and how you treat your team members and how you treat your clients, your regulators, the public, your audiences, your communities. How you value the worth of an individual, how you bring the human factor into real importance and not just a statement you make in your 'wish list' of strategic objectives.'

If you treat people with respect, then you are well on your way to earning respect...which is what every business leader must have to even have half a chance of becoming successful.

If people don't respect you, it follows they usually don't like you either and therefore they won't trust you....and trust as you know is the one thing that changes everything.

Without trust – you may as well go home.

SECONDLY – IT IS ABOUT VISION AND LEADERSHIP.

What do you want to make happen and why and how do you get your entire team on the 'same-page' and headed in the same direction as you – with passion, enthusiasm, and a 'whatever it takes' attitude and

THIRDLY - IT'S ABOUT CREATING A WINNING SALES AND SERVICE CULTURE. A culture that focuses on purpose not profit. A culture that values loyalty over and above everything else and a culture that is client -driven and loyalty managed. A culture where everyone understands that 'nothing happens until something is sold.'



So, here's what we have to do to get this heading in the right direction ...the direction of NEW Business from your existing clients and more NEW clients than you can 'poke a stick at...'

1. Create the VISION of what you want to make happen then Lead your people to that Vision
2. Treat people the way you like to be treated – The Golden Rule of Business and Relationships and
3. Create a winning Sales and Service Culture . A culture that embraces client loyalty and team loyalty...where people don't want to be anywhere else but with you and your firm...because it's irresistible. It just makes them feel good and makes them feel valued and important.

NEW BUSINESS

There are hundreds of ideas to gain new business – both from existing clients and new clients.

A few years ago, we produced **The Instant Sales and Marketing Toolkit** that lists 358 ways to get more people buying more – more often . [Here it is for FREE.](#)

The ideas listed in the Toolkit are what we might call Strategies and Tactics.

The Publication you are reading will concentrate on THE IDEAS we've discovered that work best in Accounting Firms ...primarily word-of-mouth, referrals and to some extent networking.

We acknowledge the part social media plays in generating new business and also your website, LinkedIn, Facebook, X, advertising etc... and all of those are important BUT the question I always ask our Accountant Clients is *who you are trying to attract?*

The ANSWER is invariably – quality clients, advice-seeking clients, growth seeking clients, and happy to pay for value clients.

The next thought is (and this is our research over 30 plus years) these type of clients usually don't go searching on social media or websites ...when they are looking to change accountants.

THEY ASK THEIR FRIENDS. They ask someone they trust – they look for recommendations. Then, they might look at your website etc...

That's why we will concentrate on word-of-mouth and referrals.

By the way I'm not discounting **ACQUISITIONS** as a way to get new business - it's just I see acquisitions as a bit like the *second-hand* car market. There is always the 'risk' that all is not what it seems. But, like 'cars' you can stumble on some real 'bargains' at times.

✓ Pros

1. Expanded Client Base

- Immediate access to the acquired firm's clients.
- Opportunity to cross-sell additional services (tax, audit, advisory).

2. Increased Talent and Specialised Expertise

- Acquisition can bring niche capabilities (e.g., forensic accounting, international tax).
- Helps with succession planning—especially if the acquired firm's partners are retiring.

3. Economies of Scale

- Shared back-office functions reduce overhead (IT, HR, marketing).
- Better purchasing power for software, insurance, and technology platforms.

4. Stronger Market Presence

- Larger firm can compete for bigger and more complex engagements.
- Enhanced brand reputation due to increased size and geographic reach.

5. Revenue Growth with Lower Marketing Costs

- Acquiring an established client base can be cheaper than winning new clients organically.

6. Improved Technology and Processes

- A larger combined firm may justify or afford upgraded systems, modern audit tools, automation, etc.

✗ Cons

1. Cultural Integration Challenges

- Different work styles, quality standards, or partner expectations can create conflict.
- Professional-services firms rely heavily on culture; misalignment can cause turnover.

2. Client Attrition Risk

- Clients may leave due to loss of personal relationship with their accountant.
- Fee increases or new processes can lead to dissatisfaction.

3. Staff Turnover

- Change in leadership, compensation, or workflow can cause experienced staff to quit.
- Loss of key personnel reduces value of the acquisition.

4. Integration Costs and Disruptions

- IT system migrations, training, rebranding, and restructuring are time-consuming and expensive.
- Productivity typically dips during the transition.

5. Partner Compensation and Equity Issues

- Combining firms requires aligning pay structures, buy-in/buy-out terms, and ownership shares.
- Differences in profitability can create tension among partners.

6. Regulatory or Licensing Complications

- Ensuring quality control, independence rules, and compliance across the new firm can be complex.
- Audit firms face additional oversight when merging.

7. Overestimated Synergies

- Expected cross-selling or cost savings may not materialise.
- Duplicate clients or overlapping services reduce the anticipated benefit.

This Publication ...



...is designed to provide you with the necessary information to get new business as well as the ACTION required to make it happen.

In other words, ...there is the Publication, (the Text) – and there is a WORKBOOK.

You have a choice to make ...

1. You can read the text – and that's it.
2. You can read the text and complete the workbook and/or
3. You can read the text and complete the workbook THEN discuss your ideas, answers, and next steps with us...and receive some guidance.

In scenarios 2 & 3 there is financial condition – you are asked to join [The BOSS factor Library](#)...because many of the reference points are in the library.

If you choose Option Three and/or decide to complete The SALES factor Selling course (a course designed for accountants and other professionals) then there is a standard IP fee for the program(that won't break the bank) and a monthly fee...a *nominal*/fee you will be able to relate to...since it is based on an hourly rate.

The Publication

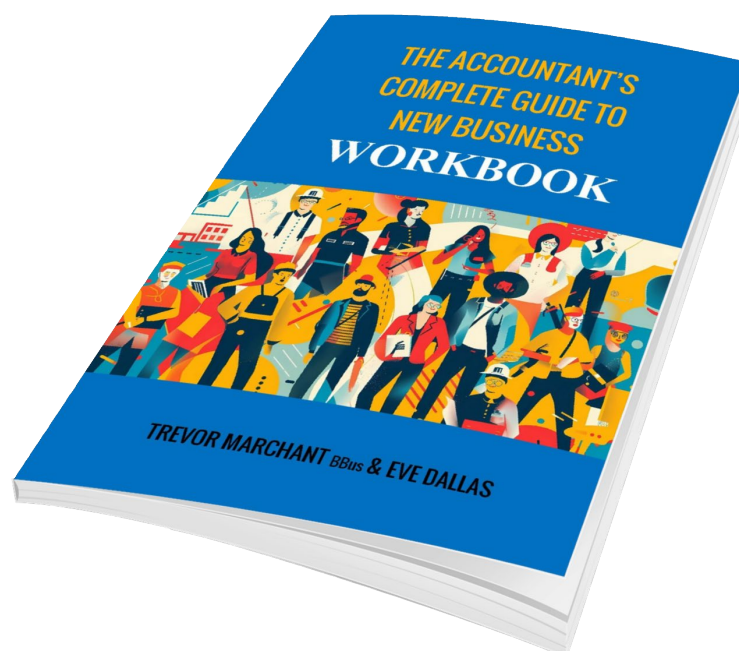


...aside from the WORKBOOK - is divided into two parts .

PART ONE deals with the THEORY

PART TWO deals with the PRACTICE

...(and refers you to the workbook)



Here's what we're going to cover:

The five and a half ways THAT CREATE THE PERFECT CONDITIONS TO ATTRACT A CONSISTENT FLOW OF NEW BUSINESS AS WELL AS HAVING YOUR EXISTING CLIENTS WANTING TO DO MORE BUSINESS WITH YOU.

1. The SALES factor
2. The Culture factor
3. The Loyalty factor
4. The Referral Code and
5. The BOSS factor Library and **Leadflo** –
a Lead Generation System that just keeps on giving ...

5½ Taking MASSIVE Action.



By the way...

We Will only Disagree on One point

The only place in this entire program
where we will disagree is at the end.

When you have finished the program and implemented and actioned the ideas
and start to enjoy and benefit from them,
You will hope your competition
NEVER does the program...

And we hope they do. 😊



1. THE SALES FACTOR

I imagined when I enrolled in a Business Course at Charles Sturt University that Sales would be a part of the curriculum. But it wasn't. In fact, the subject is absent from most business and marketing courses including MBA programs.

If you accept the idea that **'nothing happens until something is sold'** and that business is about making things and selling things, and that everything else is secondary, then this absence makes no sense.



When I asked one of my professors to explain the absence of Sales, he told me that if I really wanted to study sales, I could pay for a two-week evening course somewhere.

The truth is you could say the same thing about a lot of what the university taught, but no one was suggesting we go and learn strategy, or economics or communication, at night school.

The effects of this omission are catastrophic.

Many supposedly well-educated people in the business world are clueless about one of its most vital functions, the means by which you actually generate revenue.

When I became Head of Training, Education and Development at Westpac in the late 80s I decided we needed to teach sales to all our key frontline people, particularly those commercial managers who were dealing with business people all day long and if I was going to manage this project for the bank *then we'd better start Sales training me.*

This is when I met my long-time friend and mentor Robert E Johnson (Bob) from Greenville, South Carolina in the U S of A.

Bob was the General Manager of the Dale Carnegie organisation in Greenville and over time taught me everything I needed to know – and the skills I needed - to begin my journey as a professional salesman – and in time to be recognised as an accredited Master Sales Trainer.

Bob's programs were used throughout the Bank and people still talk about them today...as life changing and absolutely magnificent when it comes to accepting, embracing, and applying selling skills to our careers, our business and our everyday life.

So here I am now – having had my own businesses for 30 plus years and having coached, trained and mentored over 5000 business owners and managers and the members of 93 accounting firms...at last count.

This has helped them to:

- Improve their business.
- Grow their sales.
- Increase their profits.
- Gain confidence - overall.
- Gain more control over their teams and operations and
- Inject greater harmony and balance into their lives.

They've also learnt - to do all this successfully they too must:

1. **Accept** that nothing happens until something is sold.
2. **Embrace** the idea of a winning sales and service culture within their business and take the necessary steps to learn and master the art and science of selling.
3. **Apply** what they've learnt and continue to learn about sales - every minute of every day.

Here's a home truth for you:

*People know how to make the thing they sell,
but most don't know how to sell the thing they make. TM*

...and that's why many people get into trouble in business.

Businesses don't fail- people just give up. One of the reasons they give up is because they're just not selling enough of the thing they make.

Selling is not a sideshow or an annoying add-on to what people see as the real functions of business-like finance, operations, marketing, management etc....

Selling is the Business - in gorgeous Technicolor.



Richard Perry, the founder of Perry Capital and one of the most successful investors in America, puts it very simple for all of us: "It's all about sales. If I have sales, I can create profit."

*Selling is persuading someone to do something they
would not otherwise have done.*

If they would 'otherwise' have done it – then they don't need you.

Selling is the catalyst that turns potential buyers into buyers.

It's a process. It's a form of leadership. Its education. Its helping. It's sharing. It's closing the GAP between where your client is now and where your client wants to be. Its removing 'pain' and providing 'pleasure.'

Our award – winning Sales factor course for professional people, selling professional services in a professional manner is presented in 12 modules and covers three broad areas of knowledge:

1. Your Sales Mind-Set
2. Your Sales Skillset and
3. Your Sales Toolset

What this means is we're going to show you how to create the 'right' **mind-set** to give you the best chance of success in sales.

We're going to walk you through the **skill set** you will want to develop and finally we will give you a **toolset** to use to identify, attract, engage, get and keep a client or customer.

If you've read books on selling before or listened to 'sales experts,' you have probably been pumped with hot air – and told how you must 'come alive', be full of enthusiasm, and dominate the world around you - all the things that may not be a part of your basic nature.

Well, this course isn't anything like that. In fact, this course was written to refute many clichés of selling that have been accepted without question for years.

The stereotyped image of the 'born salesman' is a mistake. You don't have to remake your personality and become super-enthusiastic, super-aggressive, or domineering.

Not only are those traits not necessary, but they are also a hindrance to professional selling.

And you won't have to develop that uncanny ability to come up with the right answer at the right time. That super-human knack of having the brilliant flash of insight that is so prevalent in books on selling.

This course can truly revolutionise your selling career or whatever position you hold that inevitably involves selling-but only because it will show you that you no longer need to waste your time developing skills that are of no value to a salesperson.

For example, here are some of the points that will be made during the course:

- Contrary to the accepted mythology, enthusiasm is not an essential sales trait. Used incorrectly it destroys more sales than it creates.
- Positive thinking – while helpful is not critical to success. Being real and authentic will help you create more sales.
- Sales success does not come from convincing people to buy things they don't want. "a person convinced against their will – is of the same opinion-still".
- The salesperson who always has an answer for every objection is also probably plugging along with a very low income.
- Extroverts don't make the best salespeople; they are invariably outsold by introverts.
- To be a good salesperson, you don't have to be a 'smooth talker'.
- Another all-time sales fallacy is the statement "When the going gets tough, the tough get going". When the going gets tough, I usually take a holiday.
- The desire to be able to motivate others is unrealistic. Great salespeople know they can't motivate people to buy – so they don't try.

Having said that – there are many ideas and principles that are essential and work exceedingly well.

Many of these principles are self-evident and I expect you will be able to apply them simply and easily.

For example - If you take the time to understand why people buy things, it will open a whole new world of understanding for you. It will make it possible for you to increase your sales volume significantly and get more people, buying more – more often.

We'll discuss ideas that will help you understand what happens in every sales interview - even when you don't get the order... and these same ideas and principles will improve your relationships with other business associates, with your friends and family- simply because you'll understand them so much better.

*And what may be most important of all, you will enjoy your work much more than you ever have before. No longer will you be afflicted with *stomach aches* from the uncomfortable task of trying to be something you're not.*

You won't have to remake your personality or become a fast-talking extrovert.

This is the painless way to become a good salesperson, to influence others, to become more in demand-without remaking your personality, without becoming forceful, aggressive, or eloquent.

You can relax and be yourself; you can be honest and friendly, and you will be thanked by the buyer for what you have done for them.

Having said that I'm not going to guarantee your success.

I'm not going to tell you that you can't miss- because that would be unrealistic. It all depends on you and your willingness:

- To accept selling as a vital function of business
- Embrace selling and do your best to learn all you can – and then some...
- Apply the ideas and principles in the course in your day-to-day activities.

I just read where young Melbourne Storm NRL player, Josh Ado-Carr, arguably one of the fastest player in the league, says "the coaching staff at the Melbourne Storm have turned me into the player I've always dreamed to be. Talent can only get you so far. At the Storm you've got to work hard, and it's shown in my football for the last couple of years."

Talent + Effort = Skill. Skill + Effort = Performance...

So, if you're ready to take your talent and put some effort in and you have a strong desire to move to the next level – in all areas of your life then this is how the Sales factor course will help you:

- Discover the truth about selling and how to close the gap in your sales education and start to see more people, buying more – more often from you
- Feel what's it like to take your confidence in selling to new heights and get more 'yeses'
- Find out if you're like most people who make the same 'common' mistakes in selling – over and over again.
- How to convert your message into money by understanding all we're doing in sales is helping people make a buying decision
- Discover how you can quickly and easily have passion, purpose, and profits in your business without having to do it all yourself.
- Discover the 'secret' buried deep in the Sales factor and begin using it immediately to improve cash-flow, boost profits and create greater harmony and balance in your life.
- Imagine a simple method that creates a never-ending stream of potential clients – wanting to do business with you.
- How to create your 'irresistible offer' and watch as your enquiry rate goes 'through the roof.'
- How to shorten your sales cycle and close more deals
- Learn three simple methods to handle any objection – especially price and competition.
- Become your own sales manager and only count what really matters...
- ...and much, much, more



Bill Sexton Accounting

Trevor's ability to train and motivate salespeople and business owners at all levels of expertise is second to none. The changes to the firm's sales team were both immediate and lasting and the sense of teamwork among our employees has never been stronger. There is no other sales training out there in the same league as this.



Kate Olsen, Modure Constructions

"The Sales factor Selling Method Works! Our team used the Sales factor and it completely transformed the way we went about selling – as well as our results. It increased sales, shortened sales cycles, and gave us a way to address those frustrating price questions. Sales factor selling offers a deceptively powerful way of thinking about how to approach the sale. With the sales factor, your sales will be faster, more predictable, and more profitable."



Zac Kohler, Moranbah Rural Store

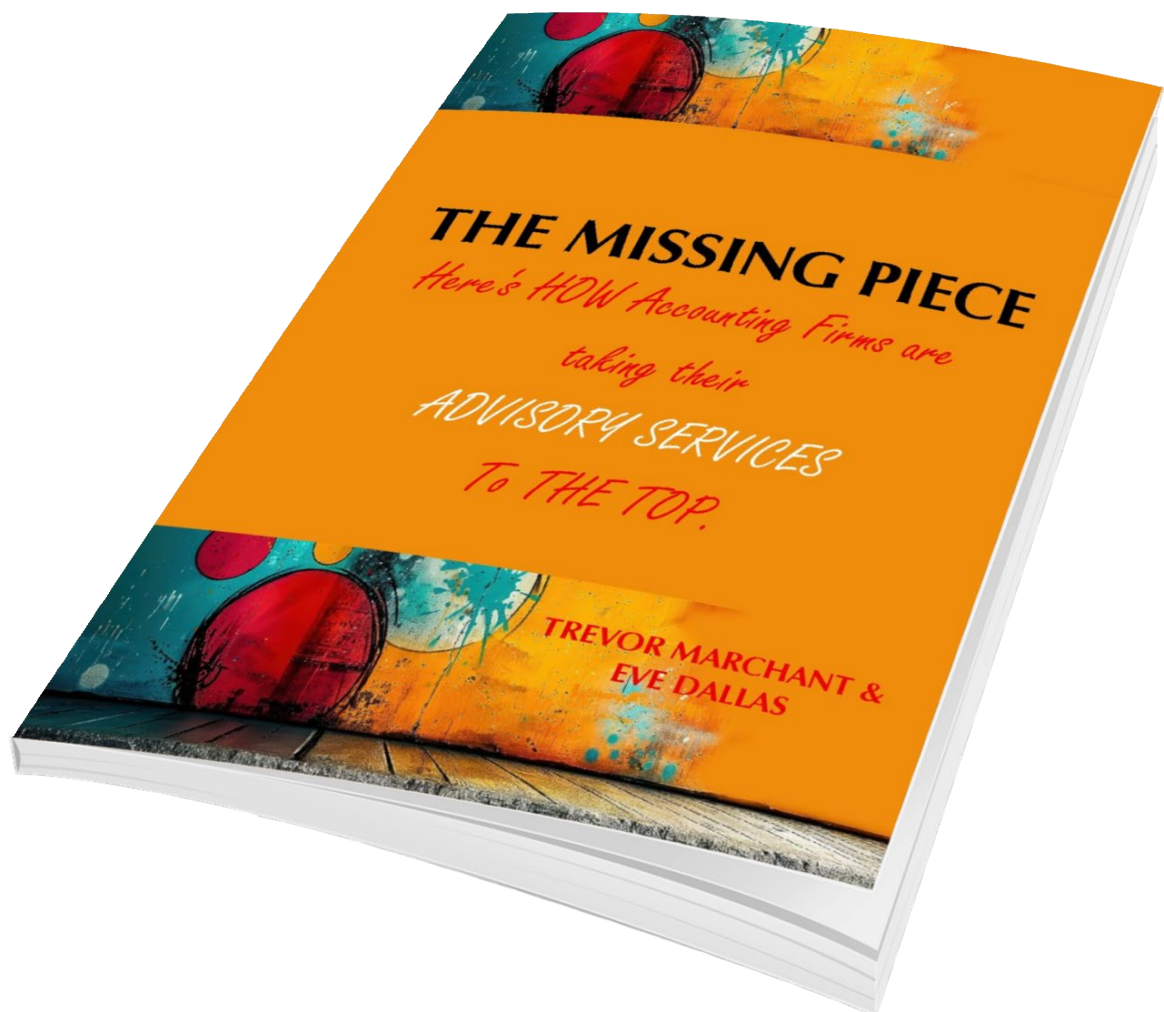
Not only does Trevor's message motivate and inspire, but it provides empowering tools for success. His Mind-set, Skill-set, Tool-set teaching in the Sales factor is simply world-class. If you want to be at the top of your game as a salesperson, business owner, or manager then his Sales factor strategies should be a 'must learn' for everyone.

Okay – enough talk – time for action.

TREVOR MARCHANT BBus.
Master Sales Trainer and featured in the top
1 per cent of Business Development Coaches
and Trainers in Australia and New Zealand

FURTHER INFORMATION

WWW.MARCHANTDALLAS.COM.AU/SALESFACTOR



[THE MISSING PIECE](#)

2.THE CULTURE FACTOR

Organizational culture is the shared values, attitudes, beliefs, goals, and norms that collectively prescribe how to behave in the workplace.

It's how employees fit in, build relationships, and move agendas forward. It influences the company's success in recruiting, engagement and retention - and performance. It's also the big-picture answer to how things get done around here.

According to Tony Hsieh, former CEO of Zappos, *"A company's culture and a company's brand are really just two sides of the same coin. What goes around the office comes around to the customer."*

Although you may think of culture as internal to your organisation, in reality, it is on display during every customer interaction. Attitudes and behaviours shape the external customer experience, and potentially even your brand.

As such, organisational culture is always shifting and changing—both in response to what's happening inside the company and what's happening in the world. And leaders are important influencers in styling and evolving the culture to meet the needs of the organisation and the customer.

**“ Organizational culture is the big-picture answer ”
to how things get done around here.**

You already know a positive company culture is crucial for business success, as it impacts employee engagement, performance, retention, and the overall reputation of the organisation. A strong culture fosters a sense of belonging, improves employee well-being, and attracts top talent.

Conversely, a negative culture can lead to decreased productivity, high turnover, and damaged reputation.

Here's a more detailed look at why company culture is important:

EMPLOYEE ENGAGEMENT AND PERFORMANCE:

- **Motivation and Loyalty:**
A positive culture motivates employees and fosters loyalty, leading to greater engagement and a willingness to go the extra mile.
- **Productivity:**
Engaged employees are more productive and contribute to a higher quality of work.

- **Innovation:**
A culture that encourages open communication and collaboration can spark innovation and creativity.
- **Accountability:**
Employees in a positive culture are more likely to take responsibility for their actions and contribute to the team's success.
Talent Acquisition and Retention:
- **Attracting Top Talent:**
A strong culture can attract top-tier candidates who are drawn to companies with a positive work environment and shared values.
- **Reducing Turnover:**
When employees feel valued and respected, they are more likely to stay with the company, reducing costly turnover and the associated costs of recruitment and training.

REPUTATION AND CUSTOMER RELATIONS:

- **Positive Reputation:**
A strong culture can enhance the company's reputation, both internally and externally, leading to increased customer loyalty and satisfaction.
- **Customer Satisfaction:**
Employees who feel supported and valued are more likely to provide excellent customer service, contributing to increased customer satisfaction.
Other Important Considerations:
- **Diversity and Inclusion:**
A positive culture embraces diversity and inclusion, fostering a sense of belonging for all employees.
- **Work-Life Balance:**
A healthy culture encourages employees to maintain a healthy work-life balance, improving their well-being and productivity.
- **Psychological Safety:**
A psychologically safe workplace encourages employees to take risks, express their opinions, and provide honest feedback.
In conclusion, building a positive and supportive company culture is an investment that yields significant returns in terms of employee engagement, performance, retention, and reputation. By prioritizing culture, businesses can create a more thriving and successful environment.

The CULTURE factor will address a 'core' list of essential ideas to create the culture you want.

It is not an 'academic' approach to creating culture – it is simple, effective, practical, and based on four decades of working with over five thousand businesses. It also has a strong bias towards attracting, hiring, and retaining top talent because that's what got you here in the first place as well as retaining and attracting your ideal clients.

On top of that, a Glassdoor study (A US based research company) found that '56% of workers ranked a strong workplace culture more important than salary, with more than three-in-four workers saying they would consider a company's culture before applying for a job there.

So, where do we start?

In the words of Buckminster Fuller:

"Things never change things by fighting the existing reality. To change something, build a new model that makes the existing model obsolete - and as you build this new model, whatever you need to know (and keep) from the past will emerge."

That said, building a great firm culture doesn't mean you have to start from ground zero.

Instead, you may just need to enhance the current culture ...build the new from the old.

Employees can't be expected to make a complete 180°. Ask your employees what they like about the current company culture, what they don't like, and what suggestions they have to help create and foster a great company culture that works for everyone.

But before we 'turn the first stone' ask yourself the question - why?

Why does the firm exist other than to make a profit?

WHY?

People don't buy what you do – they buy why you do it.

Starting with WHY gives your followers and clients a way to identify with you on a personal level. If your WHY matches their WHY, they are willing to stand with you through thick and thin.

Without a clear WHY, people default to the WHAT. Then you are always caught in this struggle to differentiate yourself in the sea of WHAT. And you are forced to differentiate yourself with features, or worse, with price.

Simon Sinek, in his wonderful book – Start with Why, describes this well:

“You have to know WHY you do what you do. If people don’t buy what you do but buy WHY you do it, it follows if you don’t know WHY you do what you do, how will anyone else? If the leader of the organisation can’t clearly articulate WHY the organisation exists in terms beyond its products or services, then how does he/she expect the employees to know WHY to come to work?”

Ironically, the most important question with the most elusive answer — WHY do you do what you do? — is actually quite simple and efficient to discover... It’s the discipline to never veer from your cause, to hold yourself accountable to how you do things; that’s the hardest part.”

When recruiting, if we ‘Start with Why,’ we can help potential employees self-select as to whether they believe in our cause. If they do, they will buy into WHY we do what we do. In a start-up, this belief in the WHY—the purpose—will sustain the employees through the inevitable ups and downs. When the company makes a major pivot, the employees will stand with them through thick and thin because they believe in the WHY.

And when other companies come calling with solely extrinsic manipulations of better salary and title, these employees will think twice about exploring those other opportunities.

So, the first step is to create a Purpose Statement ...one of the first steps in the Culture factor.

So, we’re clear a purpose statement explains your organisation’s reason for existence. It explains why your organisation began, and why it’s on that journey. It explains what injustice in the world it is seeking to right or what opportunity it is seeking to leverage.

That said our experience is people don’t want to join a company, even a company with a fancy tagline, or vision statement.

They want to join a crusade.

It all starts with answering ‘what are we fighting for?’

And once we have a clear and concise answer to that, then we’re safe to write our purpose statement and our vision statement.

So, we’re going to start with WHY. Why your firm exists. From here we will work through the following ideas:

- The Firm’s **Vision** – could be tangible or intangible
- **Values and the Core behaviours** that spring from those values
- Your Point of Difference (**USP**) and Value Proposition

- The **One – Percent** Rule
- **The Same Page including**
 - Respect
 - Attitude
 - Humility and
 - Focus
- **The ONE Thing** –(such that by doing it everything else becomes easier or unnecessary) and finally
- **Your Culture Statements/Guiding Principles**

THE BOTTOM LINE ON BUILDING A FIRM'S CULTURE:

Undoubtedly, the culture in your firm is a key factor for your employees because staff are much more likely to enjoy their roles and the firm they work for when their needs, wants and values match up with their employers. When employees work at a place with a strong company culture, they develop better relationships, are more productive, and are dedicated to meeting the bottom line.

For those who hold a leadership position, creating an environment in which the people in your charge feel like they are a part of something bigger than themselves is your responsibility as a leader.

When you set The CULTURE factor in motion 'you will immediately notice a change in your firm – for the better.

You will become the GO TO firm for top talent because the word will spread quickly. Your team will start talking about the growth opportunities that exist and simply how your firm gives them everything they want – and more.

This newfound culture will add to your point of difference and give you more tools and discussion points to share with potential new talent and existing and new clients.

"People work for people – not businesses"

Trevor Marchant



“

My mentor said,

“Let’s go do it.” not

“You go do it.”

How Powerful when someone
says

Let’s.

”

Trevor Marchant



3.THE LOYALTY FACTOR

The LOYALTY factor shows you how you can put your firm on the path to true growth—growth that occurs because your clients love doing business with you and your employees love working with you.

They will all sing your praises to neighbours, friends, family, colleagues and business associates. This is the only kind of growth that can be sustained over the long term.

Acquisitions, aggressive pricing strategies, product line extensions, cross-selling strategies, new marketing campaigns, and all the other ‘tools’ in a business owner’s toolkit may give a company a short-term boost.

But if these initiatives don’t ultimately result in delighted clients, the growth won’t last.

So, it is with market share. A dominant position in the marketplace often gives a company economic advantage. But again: if that potential isn’t utilised to make clients smile, neither the advantage nor the dominant share will last.

This lesson has taken on new importance as a quiet revolution sweeps across the business world.

The revolution, like many others shaking up the current world order, has been stoked and accelerated by the development of social media tools. Clients and employees blog, X, and text about their experiences in real time, overwhelming the carefully crafted messages proffered by advertising and public relations departments.

Power is shifting from the firms to those who buy from it and those who work for it. They will tell everyone they know about the value, or not, that you and your firm deliver.

And the indispensable ‘holy grail’ – profit, is always a consequence of value creation. Creating value for the customer is the foundation of every successful business system. It builds loyalty; loyalty in turn builds growth and profit, and still more value – in a continuous and predictable



Upward Spiral.

After 35 years in business, 5000 + business clients and at last count 97 accounting firms we've learnt a few things about what makes great businesses even greater.

- The first thing is that 'good is the enemy of great.' If you settle for good, then great could be a stretch too far.
- Respect. If people don't respect you, it follows that they usually don't like you either and therefore they won't trust you....and trust as you know is the one thing that changes everything.



WITHOUT TRUST YOU MAY AS WELL GO HOME

Tom Watson, founder of IBM said to be great – you must have a religion. You must have a set of core beliefs – core values – you live and work by. He called it a 'Credo.'

Everyone from the newest employee to the managing partner must be on the same page with these values...and embrace them wholeheartedly. It's these values that forge your culture.

For example, what we live and work by are:

- We believe everyone has potential and all they need is a gentle push in the right direction to perform and achieve their potential. That's why Marchant Dallas' driving force is 'Your Springboard to the Next Level.'



- We believe 'nothing happens until something is sold.' Every human is buying or selling something – whether it be an idea, a product or a service. Which means we all need to be trained, coached and managed in the art and science of professional selling.
- We believe in straight, open communication. People deserve the right to communicate their thoughts, wishes and questions and be answered within 24 hours. No exceptions.
- We believe you get anything in life you want providing you help enough people get what they want. Treat your clients by the 'golden rule' because when you do, they will reward you with much more gold.
- These great businesses take 'massive' action. They understand you can make money, and you can make excuses – but you can't do both.
- **Finally, and this is what brings us to The Loyalty factor.** It's no longer important what we say about our business – it is what our clients say about our business that counts.

Great businesses are client – driven and loyalty managed.



Satisfied clients Will
shop *anywhere*

Loyal clients will encourage
others to buy from you and
Fight before they switch.

Which would you
rather have –

100 satisfied clients or 100
loyal clients?

“
CLIENT
SATISFACTION
IS
WORTHLESS

CLIENT
LOYALTY
IS
PRICELESS
”

Jeffrey Gitomer

The Loyalty factor is the hidden force behind growth, profits and lasting value.

It is the difference between being marginalised as another seller of 'same-old-lame-old' products and services and a firm that focuses on creating extraordinary value for their clients.

When you have it – profit soars and people line up to have 'what he or she is having' Apple has it; Airbnb has it and Patagonia has it – to name a few.

The heart of the Loyalty factor is creating value for the client. When you create value you strengthen relationships, you increase retention rates, clients buy more from you – more often, and they tell everyone about you

...and in walks the greatest and most powerful marketing strategy ever 'discovered'...

Word -of-Mouth Marketing (...and referrals)

Take care of your clients and they will be your AD engine...

Let me be excruciatingly clear about this:

Nothing – absolutely nothing – affects the success of your business more than client word of mouth.

Client recommendations give you the magnetic power to attract business. So here is what I want you to understand – down to your bones:

If your business isn't focused on driving positive word of mouth, then the train is leaving the station without you.

So, how do you create loyal clients?

- You build a winning sales and service culture that focuses on purpose - not profit.
- You build a culture that values the 'Golden Rule' – Treat people the way you want to be treated.
- You build a culture that is client – driven and loyalty managed.
- You build a culture that values loyalty over and above everything else.
- You build a culture that creates value across every facet of the business.
- You build a culture where the primary goal is to create value leading to enhanced loyalty leading to 'word-of-mouth' marketing leading to more people, buying more – more often leading to increased growth and improved profitability.
- You build a culture where the business owners and the newest employee are all on the same page...when it comes to vision, purpose, values and loyalty.



4. THE REFERRAL CODE

A decorative graphic on the right side of the page. It features a blue circle, a green rounded rectangle, and a red shape resembling a stylized 'E' or a bracket. The background of the entire page has a faint, diagonal pattern of binary code (0s and 1s).

About the Referral Code

The story. You've just brought on board a new client worth about \$20,000 to the Firm. Not your most profitable client but not your least either.

The client came to you from a referral from one of your best clients and you didn't have to ask them to refer their friends, family, clients or business associates – they just did it.

But you did set it up. You did put a system in place that encourages your best clients to invite their friends, family, clients and business associates to enjoy and benefit what they are enjoying and benefiting from being a client of yours.

You see if you haven't reached that point where you no longer want referrals to trickle in when they're ready, coming in unannounced and more often than not of dubious quality then you will soon - particularly when you know there is a now a method you control that delivers as many referrals as you want when you want – and of the quality you want.

It's called **The Referral Code™** and it's the 'new kid on the block' and she's taking the Accounting Profession to a new level of Referral Marketing...with over 30 firms now using the system.

How to Attract as many Quality Referrals as you want when you want

...

Imagine a structured, scalable and easily repeatable method that delivers a constant stream of quality referrals wanting to do business with you.

...and no more asking.

That's right – No more asking for referrals. This is a system built for you -under advice from accountants from small and large firms – and a method that gives you total control of the flow.

Total control of the number and the timing.

That said, like a lot of new ideas there is always the questions and in some cases the scepticism.

- How do you get people to voluntarily invite their friends, family and business clients and associates to come and have a chat with you?
- How can you predict the numbers and the timing?

Sounds almost too good to be true – what's the catch?

Well, the answers are in the proof. (One firm – a small one partner firm – for example – is now \$100,000 better off in terms of new client growth since implementing the Referral Code.)

There is no catch and there is zero financial risk.

All it takes is you wanting to get a consistent flow of quality referrals and a willingness to learn, embrace and apply the method. That's it.

It's like there is a changing of the guard.

The old is new again. Here's a method that's helped build some of the biggest and most powerful businesses in the world, adapted and cleverly customised to work for any accounting firm. It's simple, and it turns your best clients into your most passionate supporters.

If sustainable growth, more predictability and control over your revenue is important to you then having a method that delivers a consistent flow of quality referrals – ready to do business with you- is ‘right under your feet.’ You no longer have to guesstimate your new client growth – you can predict it with about 90% accuracy.

At last count 93 accounting firms and around 5000 of their business clients have experienced one or more of our training and coaching programs...and every one of them (bar a few) was referred to us...and we didn’t have to ask.

You see, we’ve been using this method for over 30 years, but in all those years...and despite our success with it we never thought to share it as a separate ‘standalone’ service UNTIL several firms asked if we could help them get some control over the quality, timing and number of referrals they were getting. Well, we’ve done that and we are 30 plus firms and counting ‘down the track’ and spreading the word. (Like a good TED talk)

If you’ve tried growing your revenue using a referral method in the past and as one accountant told me – still growing at ‘glacial’ pace – it’s not your fault.

That’s because all the methods and systems I’ve studied have never been adapted for the accounting profession. **The Referral Code™** has. It’s been designed with you in mind.

It’s now your Referral Marketing System.

You probably already know that business is a great teacher.

It makes you take risks, go for your dreams, face fears, handle your emotions, deal with difficult people, and learn balance. You don’t have to do any weird workshops or sign up for any therapy sessions. Go into business and you’ll be enrolled in the greatest seminar of all time. And it happens every day, everywhere, to everyone.

You can’t avoid it.

Apart from the many challenges facing any business like:

- Retiring 'baby boomers' and the 'experience' gap that leaves in any team
- Winning the talent war
- Pressure to reduce prices
- Standing out in a sea of 'sameness' and
- Advancing Technology

...there is always the 'ever present' need to improve and grow.

I'm a firm advocate that business is all about people, products and processes.

Get the ducks lined up' and you have a better than even chance of making a profit.

I'm also a firm believer that business is about making things and selling things, and my experience since my days as Head of Training, Education and Development at Westpac is most business owners know how to make the thing they sell but the majority don't know how to sell the thing they make.

Hence, my business life has largely been dedicated to helping business owners, particularly professional service providers sell the thing they make.

And that raises the main point of this story – how do find people to sell to?

It's clear that most SMES and indeed professional service providers rely heavily on referrals and word-of-mouth for their new client growth.

From the on-the-street salesperson to the lawyer, from the entrepreneur to the accountant, endless referrals are important. From the financial advisor to the architect. From the automotive sales professional to the real estate agent, endless referrals are crucial. From the home-based business owner to the mortgage broker, and from the insurance agent to the software consultant, endless referrals are the cornerstone of business. Without being solidly based on endless referrals from our clients, customers, centres of influence and everyday contacts, the fate of any business becomes a nerve-wracking mystery, dependent on the whims of current economic conditions and buying moods.

But just asking isn't enough...and while I'm okay with asking there is a better way.

It's the **Referral Code™** and it is the revolutionary referral by invitation system for the accounting profession.

To be really effective and get more referrals, you have to invite the right people...at the right time...and in the right way - to invite their friends, family, clients and business associates to come and have a chat with you.

That's what the Referral Code is all about.

The Referral Code is a highly effective method for generating and receiving a constant stream of qualified referrals, now, and throughout the entire life of your business.

It shows you exactly how to capitalise on the goodwill you've created with your clients, customers, professional contacts, family, and friends. It has shown over and over to be the most effective warm-lead- generating system available to all business owners.

You already know Referrals and Word-of-Mouth recommendations are the most powerful way to acquire new clients and build your revenue.

Your clients, professional contacts, friends, and family – are all connected to people who want what you do and want what you have.

Most people grossly underestimate the ability of their relationships to connect them to qualified referrals, and most businesses fail to tap into their true potential for unlocking a constant stream of referral business.

Instead, they take the few referrals that may trickle in here and there, unaware those few droplets are only a hint of what they could have if they knew how to structure a system of referrals by invitation like the Referral Code™

You see not only do people love to receive referrals; they also like to be referred because it saves time and money. And don't forget people love to refer their friends, business associates and clients because it makes them feel good.

People like to do their nearest and dearest a favour.

There are eight 'keys' to the Referral Code and when each one is used exactly in line with the opening 'code cracking' procedures - businesses have soared and prospered.

Referrals come from relationships. Relationships come from connecting. And connections are built through ongoing touch points... touch points, which the Referral Code has mastered.

Here's what one of the Partners of a large firm in Rockhampton Qld said...

“Trevor Marchant’s masterful understanding of how to leverage professional and personal relationships will challenge your most basic assumptions about selling and transform the way you think about building your business. The Referral Code is a rare gem, and essential for anyone who wants to generate a stream of high-quality prospects and referrals.”

(Darren Smith – Partner Chartered Accountant Kennas.)

Remember that famous line from the movie *Wall Street*...

When trader Gordon Gecko said...

“You’re either on the inside or the outside.”

Well, many accountants (and for a while, us too) have always been 'on the outside'...

For example, has anyone ever shown you how to take say one good client and for the sake of the example – let's say the average annual billing is around \$4000 – and work with that client so they become the catalyst for \$88,000 in revenue – over the next three years as well as 14 new clients?

Has anyone shown you how to accurately predict the revenue growth and profit of your firm over the next three years?

It's time to be on the 'inside...'

A quick straw-poll of 20 accounting firms revealed that although 20-80% of all their new work came from referrals and word-of-mouth, not one had any structured or repeatable method or system to attract new referrals. Not one.

Instead, their new client business comes intermittently, often erratic and in totally unpredictable forms. Sometimes, it's good. Sometimes, it's not. Sometimes nothing for weeks. As you know this is not the way to run a high-value, high-growth firm.

Why would anyone want to leave thousands, if not millions of dollars of business to the vagaries of unpredictable, reactive referral systems...or other ideas for that matter.

Clearly, that's a business-crippling strategy and undermines the staggering growth opportunity every referral-based business is sitting on.

Why?

Because if you already generate thousands or millions of dollars annually through reactive referrals – you could almost instantly double, or even double again by adding a structured, scalable and repeatable referral generating method to the reactive approach you currently have.

You know there are few guarantees in business...but if you already generate 20-100% of your revenue from referrals and word-of-mouth using no formalised referral strategies – what we want to share with you is the most profit-certain means of successful business growth anyone has ever shown you.

As mentioned before when I started working with accounting firms one of the first things I did was get a 30-minute spot at a conference on the Gold Coast run by Smithink 2020 to talk about the idea that 'nothing happens until something is sold.'

There were about 70 accounting firms represented there and at the end of my talk about six accountants came up to me and said they enjoyed the talk and for me to give them a call.

I did that. Firstly, with Tony Gilbey of the then WHK firm in Armidale (Tony is now with FINDEX in Murwillumbah and Tweed Heads) and then he referred me on to 12 other WHK offices.

I was then referred to Burnett Business Centre who referred me to McConachie Stedman

in Toowoomba who referred me to BMO Dalby who referred me to DLA Partners in Brisbane who referred me to the Poole Group on the Sunshine Coast who referred me to Frank Shepherd in Mackay who referred me to Bill Sexton in Cairns who referred me to Steven Lutz in Southport...

...97 firms later, I'm still working with accounting firms and 80% of all my new business comes from referrals.

There are literally millions of dollars at stake depending on the size of your firm and the referral Code gives you access to that...

It's like when you see a great movie; or enjoy a restaurant; or experience exceptional service at a particular store or organisation – you want to tell someone about it.

You're happy to pass it on, to share it with the people you care about. Well, that's exactly how the Referral Code works.

When your clients use, enjoy and benefit from the products and the service you provide; when you become remarkable; when you become referrable, they will want to share the 'good news' with their friends, family, business colleagues and clients.

It's a natural phenomenon. We like to share good news.

The key is taking your service to a level it's never been before, becoming referrable and deciding to operate a referral-based business.

Getting started with the Referral Code is easy and you get something like 180% ROI.

Let me give you an example.

Say, you wanted to grow your revenue by 20% each year for the next three years...which by the way seems to be lot higher than most firms are expecting.

That means at the end of three years your revenue would have grown by about 72-73% If we were to start with \$1,000,000, by the end of three years the revenue is \$1,728,000.

To put that in Referral Code terms – we only need to be working with about 8 of your best clients to make this happen...using the \$4000 pa billings idea.

I've now been working with these ideas for many years, and I'm convinced that a structured, scalable and easily repeatable method that ensures a steady flow of quality referrals to any accounting firm is the key to exponential, sustainable and profitable growth and right now it's only attainable through our Referral Code program.



“

"I have never let my
schooling interfere with
my education".

”

Mark Twain

5.THE BOSS factor Library

The Unbelievably Easy Way to Grow Your People and Grow Your Business

Libraries change lives. (by Ted Fletcher – Engineer)

They help business owners and their teams prosper and flourish.

They open up windows to the world and inspire us to explore and achieve and contribute to improving our quality of life.

The BOSS factor Library is an expansive collection of Publications written by Trevor Marchant and Eve Dallas. These Publications are based on their coaching, mentoring, and training over 5000 business owners and accounting firms. Each publication is like a case study based on real-life situations and answers the questions being asked by business owners all over the world. They are not just someone's opinion which you might find elsewhere on the internet.

They are real.

They are practical and

They are relevant.

...AND that is the **key difference** with the BOSS factor library compared to everything else.

As such, as one accountant remarked, "The BOSS factor library is the best collection of business ideas, strategies, tactics, and inspirational stories I have ever encountered and with over 100 publications – the best value for money as well.

Trevor and Eve have spent the last 30 years helping Accounting Firms and their clients achieve their goals and dreams. They have been featured in the top 1 percent of Business and Performance coaches and mentors in Australian and New Zealand.

These publications (and there are more being added every month) are on a range of topics including Leadership, Business and Life and are written in a 'shortcut' fashion so you can get to the heart of the matter quickly.

They include stories, examples, and opinions of famous and not-so-famous people – people who have all contributed in one way or another to the topics under discussion.

For example, you may not be able to have lunch with Elon Musk, Bill Gates, Sir Richard Branson, Mary Kay or Oprah ...but you can spend as much time with them as you want by reading what they think about Leadership, Business and Life.

We read to spend time with smart people. Without reading, our experience will be limited to our direct experiences. We don't experience life quickly, so our direct experiences are limited. Of course, book learning is not as good as hands-on experience, but it may open the door to opportunities for hands-on experience and make us more effective when we get the opportunity.

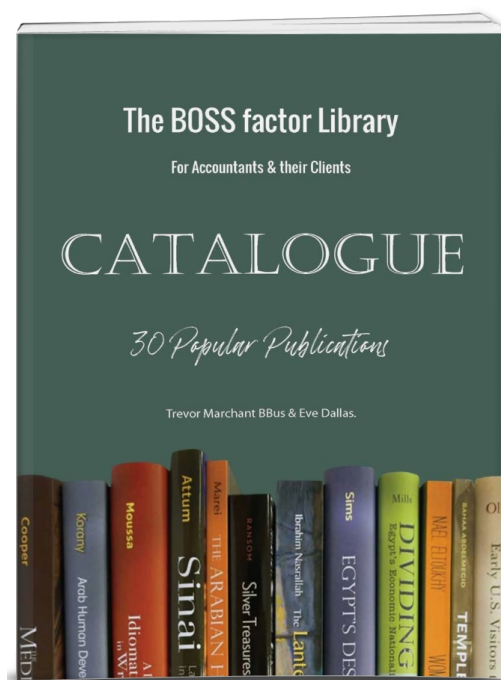
What Trevor and Eve have done is collect case studies; answers to questions being asked by businesspeople all over the world and a 'swag' of inspiring stories from famous and not-so famous people. They have researched, experimented, coached, and mentored over 5000 businesspeople and accounting firms and fine-tuned everything until they agreed on hundreds of practical and relevant answers. Then they have poured the answers into this library — with magnificent precision to a degree never accomplished before."

Ted Fletcher – Engineer

Harry S Truman (the 33rd President of the USA) said,

"Not all readers are leaders, but all leaders are readers."

[CLICK HERE FOR THE LATEST CATALOGUE](#)





... is a PRODUCT of the BOSS factor Library.

THIS IS WHAT IT DOES...

- It strengthens Loyalty and Retention – with your clients
- It gives your clients a MEANS (from you) to improve and grow their business
- It gives your clients a resource to strengthen their Loyalty and Retention with their Clients/Customers/Patients etc.
- It opens the door to a continuous stream of ‘leads’ from your clients to you
- The clients/customers/patients etc. of your clients will want to talk with you about your services

That is Leadflo

“

*"You miss 100 percent of
the shots you
never take."*

”

Wayne Gretzky

5½. TAKING MASSIVE ACTION

The Four levels of ACTION and why normal levels of action are a recipe for failure.

I've been reading and researching material written by Grant Cadone for about 6 months – Grant is an International Sales Expert – and while he's written many books and articles his thoughts on taking action – in his book - The 10X Rule – have particularly caught my eye – so I've shared them with about 100 people whom I've worked with over the years...and I thought I'd now share them with you.

Here's the gist of it and for the most part I've intertwined my thinking with Grants, so you get at least two people's thoughts...**on taking massive action.**

Depending upon your dictionary, success is defined as a

'degree or measure of attaining some desired object or end; a favourable or desired outcome; or the attainment of wealth, favour or eminence.'

Success to the extent we all desire it (and what we define it as ...) is clearly a worthwhile goal and I guess a reasonable question is **why don't we all have it - already?**

It seems to acquire the success you are looking for – for the most part – means you must live a life where you cross lines and push limits -- that's what Grant Cadone says living a 10X life is all about. You must commit to and demand success in your personal life and business life. *If you aren't* committing to success and going for 10X goals with 10 times the action you feel is reasonably required -- you are failing. You may not be failing compared to others, but you are failing compared to your own potential.

Indications are humankind acts as if it has a built-in calculator with the sole purpose of reasoning and explaining away failure.

It rationalises and helps us feel okay about failure.

The problem is the first calculations made always seem to target something other than the activity level required to accomplish a goal.

This kind of calculating tends to be more emotional than logical. It judges the project, the client, the economy, or the individual to be 'deficient' as a means of justifying why things are not working out.

Excuses such as 'the market isn't ready' or 'the economy is bad' are some of the false content loaded into these calculations by media, politicians, the education system, and the way we were raised.

More often than not it's simply we have not correctly estimated the amount of action necessary to succeed.

After 30 years of building companies and bringing new products and ideas to market I assure you there will be some things you will never foresee regardless of how detailed your business plan is. It doesn't matter if your product costs nothing to create and/or is far superior to its closest competitor, you will still have to apply 10 times more effort to push through the noise just to get people to even know about it.

There are no shortcuts. The more action you take, the better your chances are of getting a break.

Disciplined, consistent, and persistent actions are more of a determining factor in the creation of success than any other combination of things.

Understanding how to calculate and then take the right amount of action is more important than your concept, idea, invention, or business plan.

To simplify action, we've broken your choices into four simple categories or degrees of action.

4

Doing Nothing.

At this level you are not taking actions that move you forward in order to learn, achieve success, or control some area of your life. Despite what it may sound like, do not assume 'doing nothing' requires no effort, energy, or work. Regardless of which degree of action you operate at, they all require work in their own way.

Retreaters

If you operate at this level you are taking action in reverse. People who retreat are probably trying to avoid the negative experience they imagine will come from the results of taking action and possibly failing. This level personifies the 'fear of success' phenomenon. Like doing nothing, this level of action requires hard work and effort to maintain.

Normal

This is the biggest group today. On the surface this level of action is accepted as normal, but it is this level of action that created the trap of the middle class and maintains that dangerous mentality.

Although some members of this group may occasionally attempt to generate exceptional levels of action, they almost never create anything exceptional. As long as average works, people at this level are fine with it - they are comfortable with the status quo.

Massive

This fourth degree of action, as farfetched as it may sound, is the most natural state of action there is. Grant says *"I have been called a lot of things because of my commitment to action: workaholic, obsessive, greedy, never satisfied, and driven."*

Every time I have been labelled like this I have noticed the person making the comment is operating at less than the fourth degree of action.

I have never had someone more successful than me consider my levels of action excessive or bad."

NORMAL LEVELS IS A FAILING FORMULA

The average worker reads an average of less than one book a year and works an average of 37.5 hours per week. This same person makes 319 times less money than the top CEOs, who claim to read more than 60 books a year.

(See www.bossfactor.com.au and why LEADERS ARE READERS.)

When average actions hit any resistance, competition, loss, or lack of interest, negative or challenging market conditions, or all of these, you will find your project tumbling down.

Average is taking normal levels of action - and that doesn't work in any area of life.

Anything you give only average amounts of attention will start to subside and will eventually cease to exist.

Average is also the reason why most new companies fail.

Most people are building business plans based on average considerations and ways of thinking, not the massive amounts of action necessary to push through.

Average assumes—incorrectly, of course—that everything operates stably. People optimistically overestimate how well things will go and then underestimate how much energy and effort it will take just to push things through.

Average thinking and actions will only guarantee you misery, uncertainty, and failure.

**Take massive actions to have the money, time, and happiness you
not only want but deserve in life.**





Growing up I had a dog...He was an Australian Cattle Dog...and yes, his name was 'Bluey.' I wanted to call him 'Red' but mum thought that was dumb...she never saw the irony in it or didn't want to...

It didn't take me long to learn that these dogs are smart – very smart.

I've since learned their **tenacity** and problem-solving abilities have made them one of Australia's most prized working dogs

They are loyal, intelligent, and bursting with energy — the Blue Heeler (or Australian Cattle Dog) isn't your average companion. Originally bred for herding in the harsh Australian outback, these dogs are built for stamina, quick thinking, and plenty of action.

You may have wondered about the 'cattle dog' image spread throughout this publication...well it's just to remind me and hopefully you that to get the most out of this course – you need to be like the Blue Heeler.

You need to be tenacious and action – oriented. And you need to be patient.

If these three thoughts resonate with you; you will soon reap the benefits of this publication and change the way you think and act about NEW BUSINESS.

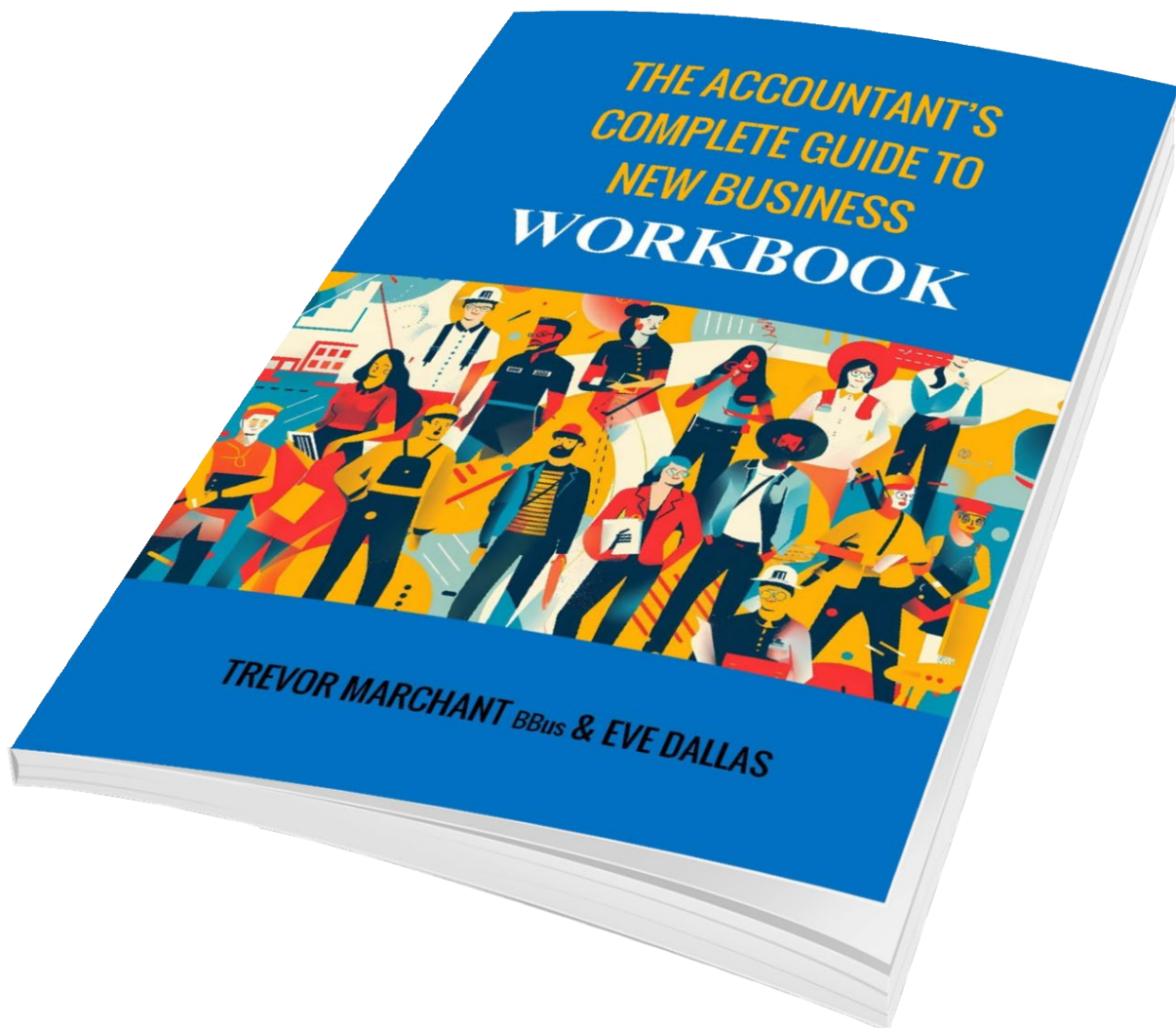
See you **AT THE TOP...**

Trevor & Eve

PART TWO ...

This is where we list **WHAT TO DO...**

The **WORKBOOK** shows you **HOW TO DO IT...**



1.THE SALES FACTOR

The SALES factor is a self-pacing ‘**Selling Skills Course**’ delivered remotely by Trevor Marchant and Eve Dallas .(Trevor Marchant is an accredited Master Sales Trainer with the Dale Carnegie Organisation – Greenville, South Carolina USA.)

(Both Trevor and Eve have been featured in the top 1 percent of Sales and Performance Coaches in Australian and New Zealand.)

The SALES factor course is an *award -winning* course and is designed for professional people selling professional services in a professional manner. It can be completed in teams or on a personal basis.

The Course is usually completed over 12 weeks (can be longer/shorter – totally up to you) and includes the following 12 Modules.

LINK to [The Secret to Selling Anything INTRODUCTION](#)

1	The Truth, the Whole Truth and Nothing but THE TRUTH ABOUT SELLING
2	How to Sell with COMPLETE CONFIDENCE
3	The Psychology of Selling and WHY PEOPLE BUY
4	HOW TO INFLUENCE PEOPLE and out-perform the competition
5	THE LAWS OF SELLING Uphold them, and you Win. Break them and you Lose.
6	QUESTIONS How to ask questions that Sell...
7	SALES PRESENTATIONS The Art and Science of World-Class Presentations
8	OBJECTIONS How to Handle any Objection
9	CLOSING How to Close More Sales – More Often
10	THE A-Z OF PROSPECTING ...for New Business
11	HOW TO DELIVER OUTRAGEOUS SERVICE and build a tribe of raving fans
12	HOW TO CRACK THE SALES MANAGEMENT CODE and be your own Sales Manager
BONUS BOOKS	
1	QUESTIONS You could use with prospects and clients
2	MAGIC TRANSITIONS 97 Magic Phrases and Bridges that almost compel readership and help you get from one idea to the next
3	MAGIC WORDS Exactly what to say when in the middle of Anywhere – in the Sales process
4	PROSPECTING 30 Prospecting Ideas from the Instant Sales and Marketing Toolkit

The PROCESS

- Participants read a Module, make notes and answer 10 questions.
- If working in Teams - they discuss their answers with the other participants
- They agree the BEST answers for the Module and send the best answers to Trevor@marchantdallas.com.au
- Trevor/Eve will comment on the answers and arrange a ZOOM/Teams or Telephone meeting to discuss the answers and answer any questions
- This Process is repeated throughout the 12 Modules.
- It is the same process for an individual without the discussion with other participants
- IN ADDITION – We work through a number of 'live' case studies with all participants, so they receive practical, hands-on, coaching and guidance.
- We also introduce our exclusive product/service matrix and show you how to 'sell more' to your existing clients and we introduce you to our Referral Code System. This is a referral by invitation method that delivers as many referrals as you want when you want and of the type you want.

THE BENEFITS

- | | |
|---|--|
| ✓ Discover the truth about selling and how to close the gap in your sales education and start to see more people, buying more – more often from you | Sales factor and begin using it immediately to improve cash-flow, boost profits and create greater harmony and balance in your life. |
| ✓ Feel what's it like to take your confidence in selling to new heights and get more 'yeses' | ✓ Imagine a simple method that creates a never-ending stream of potential clients – wanting to do business with you |
| ✓ Find out if you're like most people who make the same 'common' mistakes in selling – over and over again. | ✓ How to create your 'irresistible offer' and watch as your enquiry rate goes 'through the roof.' |
| ✓ How to convert your message into money by understanding all we're doing in sales is helping people make a buying decision | ✓ How to shorten your sales cycle and close more deals |
| ✓ Discover how you can quickly and easily have passion, purpose and profits in your business without having to do it all yourself. | ✓ Learn three simple methods to handle any objection – especially price and competition |
| ✓ Discover the 'secret' buried deep in the | ✓ Become your own sales manager and only count what really matters...
...and much, much, more |

THE INVESTMENT

There is a fee for the IP/Material that can be spread over the 12 weeks and there is a fortnightly fee – based on hourly rates – for coaching and training.

2.THE CULTURE FACTOR



“Train people well enough so they can leave, treat them well enough so they don’t want to.”

-Sir Richard Branson

Company culture is the personality of a company.

It defines the environment in which employees work.

Company culture includes a variety of elements, including work environment, company vision, values, ethics, expectations, and goals and the biggie – WHY.

Why does the company exist in the first place?

Your culture lays out your guiding principles - the foundational elements that constitute your brand and define the DNA of the company. When expressed clearly, your organisation’s guiding principles can help you attract and retain employees and talent, as well as clients that align with both who you are and where you’re going as a firm.

And just why is company culture so important?

For starters, it leads to higher productivity, improved morale, greater employee engagement, more sales, more innovation and creativity, lower turnover and so much more.

So, if attracting, recruiting, and hiring top-quality talent for your firm is important as well as retaining and attracting more of your ideal clients then we need to set the scene – we have to get the culture right. We want to create an environment where people are ‘lined’ up- to get the chance to work with you and they never want to leave.

That’s what **The CULTURE factor** promises.

An irresistible culture.

One where employees are saying:

“I can’t imagine working anywhere else.”

“I’ll never go back to working at a traditional accounting firm.”

“It’s clear why people want to work here – everyone is encouraged and supported to be deeply successful.”

“Their business model allows teams to bring their whole selves to work every day,”

“The culture here is irresistible.”

...and Individual employees are saying:

I matter

People need to really believe what they (and you their employer) are working towards - matters. They have to believe in it. If they don’t, they’re less invested in the outcomes and less likely to stay in the long-term.

Leaders must be clear and communicative about the mission of the company and why it’s important in the grand scheme of things. They must update people on progress often—a single annual speech at the Christmas party doesn’t cut it. Instead, use your communication platform (or even email) for a monthly leadership article. Or even better use your Monday morning ‘line-ups’ to communicate. More about this later.

I belong

People want to identify with the values of the place they work, and these values must honestly reflect the workplace culture. In this way, people are more likely to find like-minded individuals and form friendships or a sense of ‘tribe’ with their colleagues.

When you invite people into your company make sure you clarify your values and encourage them to contribute and strengthen your culture. Your people are the strands that make up the fabric of your company; they have to understand what the values are but feel comfortable being themselves within the environment.

I’m enabled

This one is pretty straight-forward despite being a broad topic. People need access to the appropriate tools, information, and processes.

Furthermore, they need clarity on how to find help, get work done, and make decisions. And they need to feel enabled; be provided with that fine balance of support and hands-off management so they can get their work done.

The aim is to be as transparent and informative as possible, so people know where to go with their questions and requests. Not only give people the tools they need, but also give them the support and clarity they need. Direct managers have an enormous influence on their team members, so make sure they're listening to their team members and filling any holes that seem to appear.

I contribute

People need to know that their contributions provide value. They must be clearly shown where they fit within the overall purpose of the company and how their work positively impacts progress.

The key to this is recognition, regular and genuine recognition. (Again, once a year in an annual review isn't good enough.) Your recognition doesn't have to be complicated or expensive. Simply saying "thank you" can be an incredibly powerful way of showing someone you appreciate their work.

I'm respected

People need to feel they're respected so they can freely express themselves and feel heard. If they do, trust will grow, and collaboration will bloom. If they don't, they'll end up feeling demotivated, insulted, or frustrated. Ultimately, they become disengaged.

You have the power to make someone feel respected even if you disagree with them. It's fine to question, or seek clarification on, a person's idea or work.

However, they must never feel like you're questioning their motive or qualifications. If you can't build up this level of respect, then change something, your attitude, your team, or your job.

You will see, building a great company culture doesn't require a massive budget. Whatever your financial situation, company size, and industry, building a great company culture is completely within your means. As long you invest genuine time and interest in the happiness and wellbeing of your employees then a positive company culture will grow.

The CULTURE factor addresses a 'core' list of essential ideas to create the culture you want.

THE PROCESS

Here are the steps:

- **We start with WHY.**

Why your firm exists over and above making money.

- From here we will work through the following ideas:
 - The Firm's Vision – could be tangible or intangible
 - The Firm's Mission (if different to why/purpose)
 - Your Values and the Core behaviours that spring from those values
 - Your Point of Difference (USP) and Value Proposition
 - The One - Percent Rule
 - Getting everyone on the Same Page including
 - Respect
 - Attitude
 - Humility and
 - Focus
 - The ONE Thing (such that by doing it everything else becomes easier or even unnecessary)– and finally
 - Your Culture Statements/ Guiding Principles.

THE INVESTMENT

Firstly, there are no restrictions on numbers – the more the merrier. There is a one-off IP/Material fee for the firm and a fortnightly coaching/training fee – based on hourly rates.

3.THE LOYALTY FACTOR

THE PROCESS

There are Five KEY IDEAS in the Loyalty factor program:

1. In what ways can we improve your level of service and client relationships?
 2. How we create even more value for your clients?
 3. How to become a client – driven – loyalty managed firm ...resulting in word-of-mouth marketing as your primary source of new business
 4. Becoming a 'One-Percenter' and becoming better – better is different
 5. Having everyone on the SAME PAGE – from the newest employee to the Managing Partner when it comes to Vision, Mission, Values, Core Behaviours, Point of Difference and Key Marketing Message.
- It is conducted over four months...but that said, it is a self-paced program meaning you do it at your pace...you can take longer or shorter – that is up to you and your team. You would need to find about **an hour per fortnight** to do the program.
 - You and your team are 'coached' through the program by Eve and Trevor...this is done by regular ZOOM meetings, videos, emails and if necessary, SMS
 - The program is built around a TEXT and a WORKBOOK.
 - You can do it as a firm or do it individually or in teams – your choice.
 - Larger firms do it in teams, then come together as a firm to discuss ideas, strategies and action plans.

THE INVESTMENT

There is a ONE-OFF fee for IP/Material and a fortnightly coaching and training fee – based on hourly rates. There are no restrictions on numbers.



4. THE REFERRAL CODE

THE PROCESS

There are eight steps to 'cracking' the Referral Code ...here they are :

1. **The Numbers.** What do you want to make happen and why? What have you done up until now; what worked? What didn't? What should we start, stop or continue?
2. **Your Ideal Client.** Who do you want to attract? What are their ideal characteristics?
3. **Who you 'gonna' call?** Your best referrals come from your best clients. List 10 'ideal clients.' Clients you would like a never-ending stream of...
4. **Your Product/Service Matrix.** This is where we make sure your clients have everything they want and need to improve and grow their business and achieve their lifestyle goals. This is about pre- eminence. It's about you as the trusted advisor and the absolute authority and supplier of 'whatever it takes' to help your clients become successful.
5. **Becoming Referrable and then Some.** We all think great service makes us referable but it's only the first step. There are many 'moments of truth' we have to adhere to...
6. **The Incentive.** This is the 'secret sauce.' We have something unique to give them ...something that will help them improve and grow and achieve their lifestyle goals and as a result – they will want to do something for you.
7. **The Invitation Process.** This is where we invite our clients to invite their clients/customers, friends, business associates etc to have a free discussion with you.
8. **Sales Management.** The old adage ..." You can't manage what you can't measure" comes into its own here. This is the on-going process of measurement and management of what is working and what is not...and making the necessary adjustments to keep everything on track.

Here's what we're looking at with the Referral Code:

ASSUMPTIONS:

- Average annual Billing per Client = \$5000
- We work with 10 of our best/ideal clients
- Each of our best clients refers 2 new clients – in the first year (they never have to refer another client for this to work)
- Each NEW client refers 2 new clients in their first year...

Referral Code (RfX)		Year 1	Year 2	Year 3	
CASE STUDY:					
Average Annual Billing per New Client	\$ 5,000	x 6	x 14	=	\$ 110,000
AT START - Number of Current Clients in RfX (Providing referrals)	10				
Referral Code (RfX) generated per client over 12 months	2				
- New Clients Generated in Year from RfX	eg. 2 x 10	20	40	80	
- New Clients from Previous Year RfX now in next year's revenue		0	20	60	
- ANNUAL Cumulative # of New Clients		20	60	140	
- ANNUAL New Revenue Generated		\$ 100,000	\$ 300,000	\$ 700,000	\$ 1,100,000
					TOTAL GAIN over 3 Years
					Percentage GAIN
					2100%
					ROI Annualised
					180%

RESULTS

- Total NEW revenue in three years – starting with 10 clients = \$1,100,000
- This is why I prefer REFERRALS to Acquisition 😊

THE INVESTMENT

There is a ONE-OFF fee for IP/Material and a fortnightly coaching and training fee – based on hourly rates. There are no restrictions on numbers

5.THE BOSS factor Library

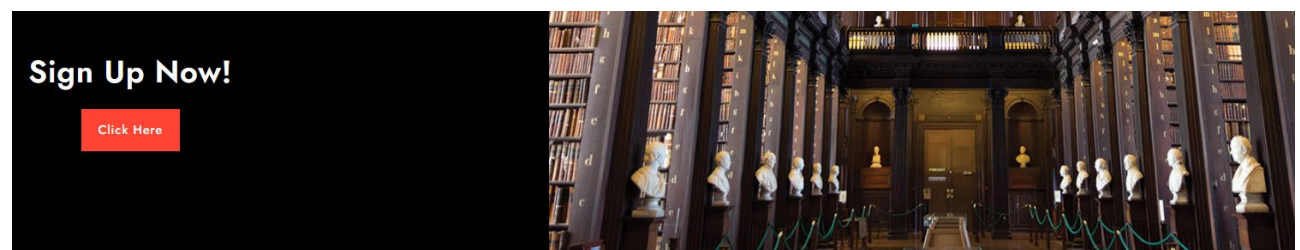
Here is a list of the benefits and applications you receive when you join the BOSS factor Library. The main difference between your subscription and a non-accounting firm subscription is YOU have the power to give business owners FREE access to the library for 3 months...with no restrictions or conditions.

THE BENEFITS

- Instant ACCESS to hundreds of ideas and strategies to take you and your business to the Next Level
- A gift for your clients. How to thank your clients for their business which leads to stronger loyalty from them and increased retention
- Business Owners can join the library for \$23 pm or they can get it from you for FREE. What are they going to do?
- The Library shows you how to generate new work from your clients – particularly advisory work
- It's a lead generation system. You can target new clients using the BOSS factor library as the 'conversation starter.'
- It's an integral part of our ground-breaking Referral Code™ program that delivers as many referrals as you want when you want and of the quality you want
- How to even-out the tug of war between capacity and growth. Capacity needs growth and Growth needs capacity. One without the other leads to an imbalance and a series of 'headaches.' The BOSS factor library will show you dozens of ways to grow your business and at the same time show you how to retain your top talent and attract more of the same
- The Library shows you how to create a Point of Difference. A difference that attracts the best talent available and makes it easier for you to recruit and retain them. As you know people are looking for more than just a job. They want to work where there is opportunity for growth and tools and resources that enable them to improve and grow
- The Library is a means to meeting one of every business owners greatest challenges – How to get everyone on the Same Page...with our unique 1 percenter and Samepage program – exclusive to the BOSS factor library
- Click on the right knowledge at the perfect time. Curious people are drawn to the BOSS factor library because they know they can quickly access the knowledge they want – exactly when they need it. This no-fuss, no-stress approach to learning removes the time and strain that might otherwise go into research. This way, intellectual thinkers can keep up to date with ideas that work, fill gaps in their knowledge, and easily integrate learning into their everyday lives
- How to dispel the sales myths that hold many firms back from reaching their potential
- A dedicated, practical business and leadership resource for the personal and professional development for you, your team and your clients
- A leader's guide and individual learning guides for every publication
- You can list individual publications on LinkedIn to grab attention, increase your network and generate new work

- There is relevant content for your Blogs, Newsletters and all your Social Media strategies
- It includes a copy of the popular Instant Sales and Marketing Toolkit with 358 ways to attract new clients, increase the value of every sale and ensure your clients remain loyal
- Regular updates with new and innovative applications of the library
- Free guidance – ‘where to start’ based on your current frustrations and challenges
- You can conduct team meetings around specific topics
- Use individual publications as a free download on your website
- Use the library to support various business community events and activities
- It is the foundation of the BOSSfactor and MICROfactor business coaching programs for your existing and new clients. This is a program built for you to run with your clients and potential clients
- It's also the foundation of the award-winning SALES factor program. A sales course that teaches professional people how to sell professional services in a professional manner
- The library includes our FREE exclusive WORD OF MOUTH PROGRAM that gets you in front of your client's clients/customers. This is how we help you get a continuous stream of clients wanting to do business with you. We call it Leadflo.
- It is another strong point of difference for your firm. In fact, you can elect to be the only accounting firm in your location who has access to the BOSS factor library should you choose
- It's also an advertising opportunity for your firm to be listed on the BOSS factor library website
- There are specific publications for Accounting Firms as well as SMEs
- And there is an opportunity for you to write and submit specific articles to the Library to promote you and your brand

THE PROCESS & INVESTMENT



Total Monthly Amount \$77.00 inc GST

[Join Library](#)



HAPPINESS GUARANTEED

We are incredibly proud of our BOSS factor publications and no matter what, no questions asked, no holds barred, no ifs, no ands, and no buts. If you are not totally happy with your library membership within the first 30 days of joining just reach out to us and we will refund your joining fee in total. Happiness Guaranteed.

REFEREES...

Over the last 30 years we have worked with some OUTSTANDING ACCOUNTANTS...

Here's a list of a few who would be happy to take your call anytime – if you want to discuss our 'bona fides'

- John Apolloni, Journey 2 , Wollongong NSW
- Bill Sexton, SidCor, Cairns QLD
- Steven Lutz, Lutz and Associates, Southport QLD
- Shane Evans, Easdowns, Wagga Wagga NSW
- John Kerrisk, MacLean Partners, Townsville QLD
- Brent Giles, Kennas, Rockhampton QLD
- David Leddy, DLA Partners, Brisbane QLD
- Ryan Mathews, HC Partners, Umina NSW
- Lisa Daw, Findex, Ballina NSW
- Marc Carpenter, Advice Centre, Hervey Bay QLD

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