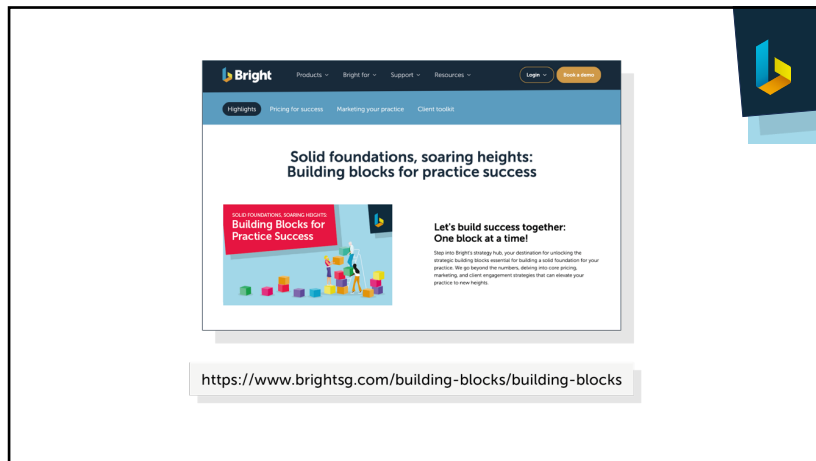




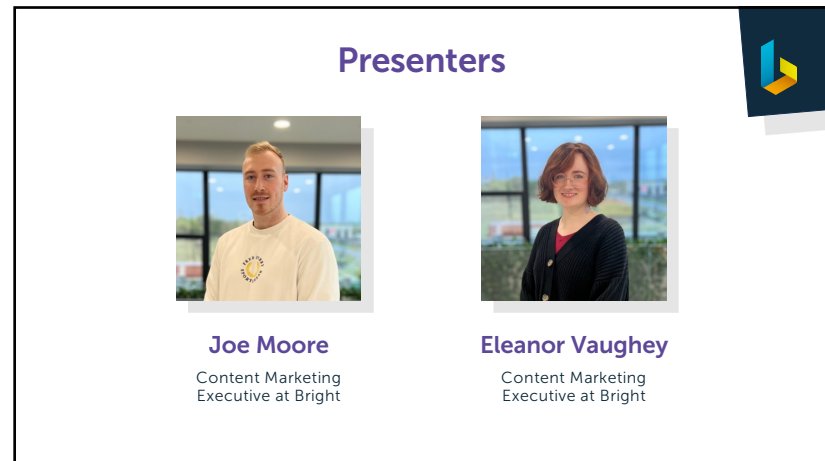
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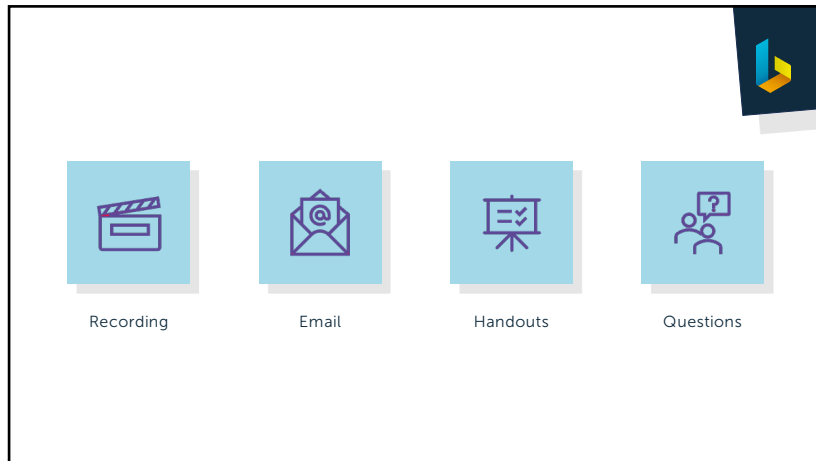
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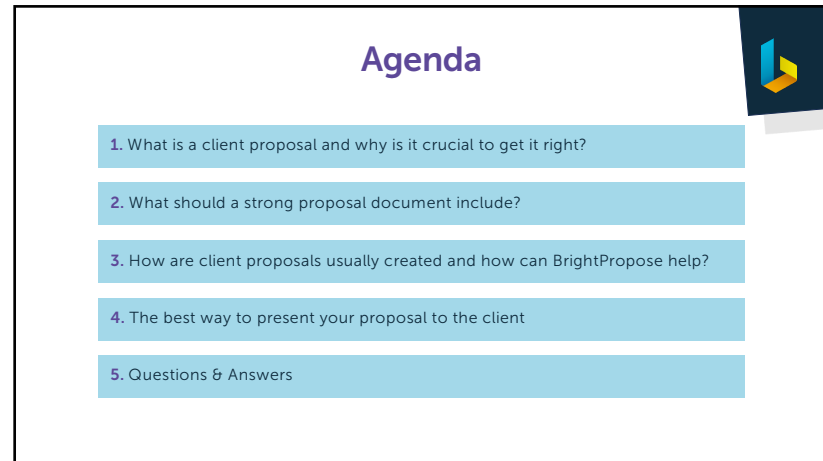
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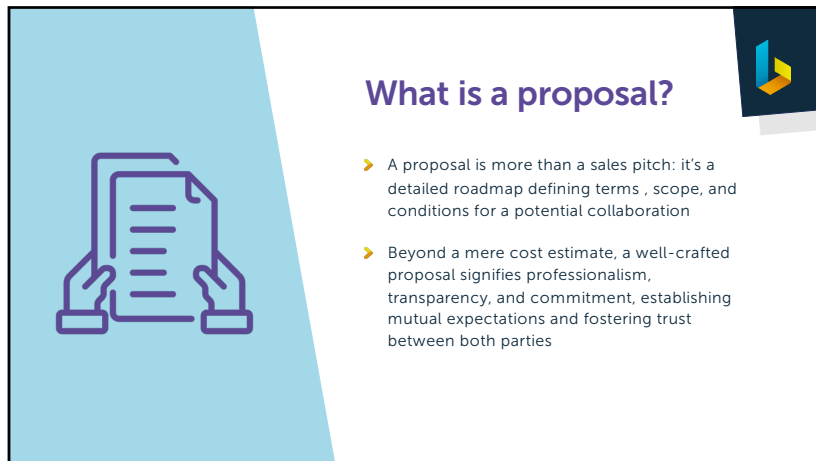
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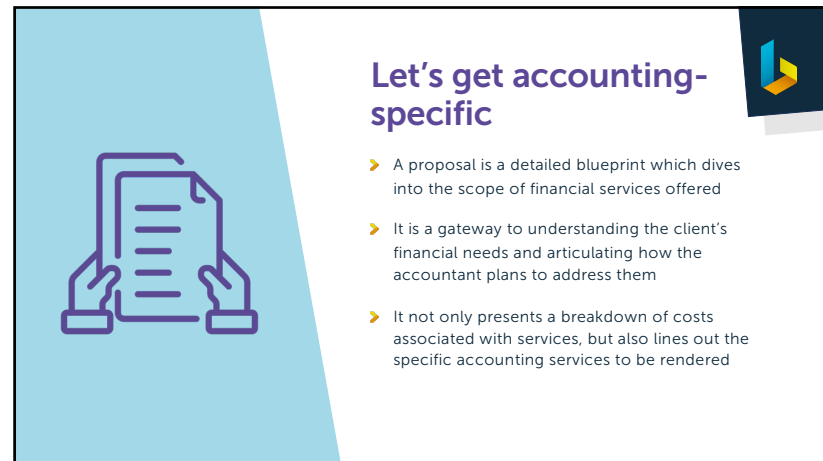
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8



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Aligning client expectations

- > Accurate and clear proposals are crucial for aligning client expectations, detailing services, costs, and expected outcomes
- > Ambiguity in proposals can erode trust and damage relationships



10

Professionalism and expertise


- > A well-crafted proposal demonstrates an accountant's expertise, showcasing a clear understanding of a client's needs
- > Clear articulation of service value and a comprehensive approach builds trust, making clients more likely to entrust you with their financial matters




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Responsiveness and adaptability

- > A well-constructed proposal anticipates changes in client needs and regulations, enhancing the accountant's adaptability
- > Well-defined terms offer a reference point, enhancing client security and establishing a transparent professional relationship



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Clear financials **Effective and persuasive copy** **Unique branding**

13

Fixed / Tiered packages


- Accountants commonly simplify pricing with fixed fees, presenting clear service packages and costs in client proposals
- These packages offer clients tailored options for transparent and predictable costs
- Tiered packages facilitate collaborative conversations, allowing accountants and clients to design customised service plans



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Fixed / Tiered packages

- Balance in service tiers is crucial to avoid inefficiencies; clients may find the model complex, requiring clear communication for informed decisions
- Despite challenges, tiered packages provide financial predictability, transparency, and simplicity
- The tiered model encourages collaboration, emphasizing personalised communication and customisation, combining structure with flexibility



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Time-based billing


- This is where accountants break down their services with expected time frames and corresponding costs
- It ensures clients are not only aware of the financial commitment but also provides a clear breakdown of the work involved in their financial affairs



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Time-based billing


- › Builds trust by offering clients a clear view of service efforts, detailing time for tasks like tax preparation
- › Difficulty in precise time estimation can lead to discrepancies, impacting cost estimates and potentially straining relationships
- › Unexpected issues may require extra time, causing concerns about cost control



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Our recommendation


- › No accounting practice is the same; Different firms will have different strengths, weaknesses and capabilities
- › Weigh up all the potential pricing models available and select the one which best suits your needs



18

Copywriting tip #1


- › Structure your proposals
- › A strong proposal features an executive summary and clear sections on services, pricing, and timelines, using headings for easy navigation
- › Headings act as a visual guide, breaking down content and enhancing presentation, making the proposal user-friendly and ensuring clients swiftly grasp the value without feeling overwhelmed



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Copywriting tip #2



- › Tailor the proposal to your clients
- › Personalise proposals by mentioning the client's business and industry
- › Emphasise the value and ROI of your accounting services with persuasive and concise language
- › Use AI tools like ChatGPT to simplify copywriting, tailoring the content to your brand's tone for efficient and personalized proposal writing



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Copywriting tip #3



- › Weave a narrative into your proposal for a more impactful presentation
- › Personalise the proposal by breaking down each service, highlighting its specific value
- › Design the copy like chapters in a story, taking the client on a journey that is not only informative but engaging, making the proposal relatable and memorable



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Copywriting tip #4



- › Capitalise on existing copy and content such as testimonials and case studies
- › Testimonials provide powerful endorsements, showing your expertise and positive impact on clients
- › Case studies offer in-depth insights into specific scenarios, showcasing problem-solving skills and tangible benefits
- › They also add a human touch to your proposals



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Copywriting tip #5



- › Consider the 'So What?' test
- › Use the 'Fresh Eyes' method
- › Step back and seek input from colleagues for a new perspective
- › This collaborative approach enhances the quality of your copy, uncovering nuances, identifying improvements, and ensuring a polished, error-free final product



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Branding is crucial


- › Projecting a professional image
- › Establishing credibility
- › Developing memorability
- › Differentiating from competitors



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Where to start?


- › The cover page of your proposal is a great place to start showcasing your brand
- › To do it effectively, make use of your: Brand colours, practice logo and high-resolution logos
- › Trickle your branding throughout your proposal and include a final page to conclude the document



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Unique branding

- › For those new to branding, tools like Canva make it manageable
- › Ensuring consistency by using uniform colours, typography, and your logo in proposals for a professional look
- › Maintain a consistent tone in written content to enhance a recognisable brand voice and ensure a professional and cohesive appearance in proposals




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How are proposals usually created?




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- Emails and Word docs
- Editing Templates
- Proposal Software

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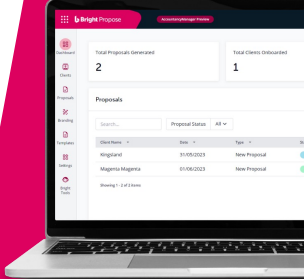
BrightPropose

-  Create proposals within minutes
-  Removes the guesswork
-  Customisable branding
-  Pre-made templates or build your own

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How BrightPropose works

- Setting up branding in BrightPropose is simple; just configure it in the branding tab, ensuring a professional presentation of your brand
- Manage services, custom fields, and calculations in BrightPropose's settings tab for tailored proposals and letters of engagement
- Easily edit templates, create proposals, and track prospect acceptance, allowing you to focus on other crucial tasks



Total Proposals Generated		Total Clients Onboarded
2	1	

Client	Date	Status
Kingland	21/05/2023	New Proposal
Algeria Magenta	01/06/2023	New Proposal

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BrightPropose

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How to present the proposal to your client

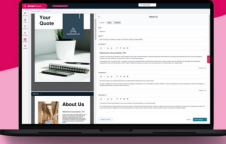



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Want to win more clients?


Discover BrightPropose

Present your proposal

- Drive conversions by presenting proposals in meetings, whether face-to-face or through virtual platforms
- Guide clients through the proposal, highlighting the unique value of each service before introducing the quoted price
- Building up perceived value fosters a positive reception to pricing details, setting the stage for an engaging and persuasive discussion and increasing the chances of conversion


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The Do's

- Treat your proposals seriously
- Add structure and use persuasive language
- Focus on the value you will bring to the client
- Ensure your services are priced accurately
- Make use of your branding and tone of voice
- Capitalise on AI tools such as ChatGPT
- Use a proposal software to streamline the creation of professional, branded and accurate proposals

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The Dont's

- Underestimate the importance of your proposals
- Consider a simple email or Word doc to be enough
- Fail to tailor your proposals to your prospects
- Fail to focus on the value that you'll bring to the client
- Include any images that are not high-resolution
- Ignore the importance of meetings when presenting proposals

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Upcoming webinar:

How to overcome technology resistance with clients


Tuesday, 16th January, 11:00 am





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Questions & Answers



The slide features a white background with a dark blue header area in the top right corner containing the Bright logo. The main content consists of three light blue squares arranged horizontally. The first square contains a purple icon of a computer monitor with two stylized human figures. The second square contains a purple question mark icon. The third square contains a purple icon of two overlapping speech bubbles.

37



Bright
Simply brilliant software

Accountancy, tax, payroll and practice management software

BrightPay **Bright**Manager **Bright**Tax
BrightAccountsProduction **Bright**CoSec

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