



Perfecting the Pitch Meeting

Business Development is crucial to the health of CPA firms and an important factor in the track to partnership for individuals. The first step in the process of gaining new business is understanding prospecting. This course covers the steps necessary to successfully pitch your prospective client by understanding your differentiators and learning how to prepare for pitch meetings. This is your opportunity to wow them so it's important to be able to communicate your value in a way that draws them in, gets them excited and gets them to buy in on the unique value that you bring to the table and why they should move forward with you.

Participants will learn how to:

- List the 4 steps that make a great presentation
- List the 3 areas of knowledge to research before a pitch
- List 3 types of questions to use in each pitch meeting
- List the 6 areas for differentiation that help you tailor your pitch
- Identify the 3 parts to a successful presentation

To register, visit www.thesalesseed.com and select "Self-Paced Training" or contact info@thesalesseed.com for firm specific options.

In order to receive CPE credit, participants must log into the training session and answer all applicable questions during the presentation.

Participants will receive 1.5 CPE Credits

Field of Study: Communications & Marketing

Additional Information:

Prerequisites: This course requires at least 3 years of work experience or the attendee should be in a manager role or higher. Attendees should have a basic understanding of business development principles.

Who Should Attend: Anyone interested in business development and revenue growth including those currently in firm leadership or those striving towards a leadership role. Attendees should be in a manager role or higher.

Advance Preparation: None

Program Level: Intermediate

Delivery Method: QAS Self Study

Refunds & Cancellations: Cancellations or modifications to registrations must be made within one week of purchasing the training course. Full refunds are available during this time if the customer has not logged into the training platform (<https://thecpeseed.com>). Please email info@thesalesseed.com to request a refund. For more information regarding administrative policies such as complaint and refund, please contact our offices at 859-594-7844.

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