

My **3 GOAL SHEET** for Learning a New Practice Growth **Tool, Strategy** or **System**.

1

Goal #1: Learn About a New **TOOL**: *"Hey is there some TOOL you use in your practice that helps you do things better, faster or cheaper that you could tell me about?"*

2

Goal #2: Learn About a New **STRATEGY**: *"Hey is there some STRATEGY you use in your practice that helps you do things better, faster or cheaper that you could tell me about related to: Appointment Setting, Getting Foot in Door With Leads, Advertising, Overcoming Objections, Tax Return Processing..."*

3

Goal #3: Learn About a New **SYSTEM**: *"Hey is there some SYSTEM you use in your practice that helps you do things better, faster or cheaper that you could tell me about?"* Some examples are:

Advertising Systems, Sales Systems, Client Lead Generation Systems, Follow Up Systems, Email Systems, CRM Systems, Payroll Systems, Tax & Accounting Systems, Scheduling Systems, Organization Systems, Computer Systems, Telephone Systems, Document Management Systems, Workflow Management Systems



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What Do I Want & Can I Learn About Each Of Troy's Practice **Growth Methods?**



What are you or your appointment setter **doing or saying** to get more appointments with business owners?



What are you **doing or saying** to **find and persuade** more people to move financial assets over to you?



What are you **doing or saying** to get **find and persuade** other accountants to potentially SELL their firm to you?



What are you **doing or saying** to get **find and persuade** people to hire you for a Business Valuation engagement?



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