

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Dear Friends,

As the holiday season unfolds, the pressure to find the perfect gift can feel overwhelming. Deals, promotions, and those persistent pop-up ads seem to follow us everywhere. (How do they *always* know I just searched for a grits recipe?) This time of year, your clients are laser-focused on selling. But it's also the perfect opportunity for you to **sell** additional services and make a lasting impact.

I know, I know—the word "selling" makes many of us cringe.

But here's the thing: in our profession, selling is really *educating*. It's about helping your clients understand their needs and showing them how you can address them. It's not about pushing services—it's about connecting the right solutions to the real challenges they face.

When I was in the software industry, my focus was always on education. Rather than getting lost in product features, I tried to paint a picture of the business problems our solutions addressed. Today, when I work with wineries, I teach financial education classes that show the value of timely, actionable financial insights. Once clients understand the "why," they're eager to explore the "how."

This is the perfect season to plant the seed for a **post-holiday sales debrief** with your clients. Offer to sit down with them in January or February to analyze their sales performance.

Here's what you can review together:

- Budgeted vs. actual sales
- Marketing metrics and ROI
- Effectiveness of their sales tools
- Customer interactions and referral patterns

Ask thought-provoking questions, like:

- How often do you engage with your customers?
- What percentage of customers refer others, and who are your top referrers?
- Have you conducted a customer needs survey recently?
- Do you bundle your services with others or recommend complementary products?
- How do you handle customer complaints, and are employees empowered to resolve them?

By helping your clients reflect on their sales processes and uncover opportunities for improvement, you position yourself as a true partner in their business success. And that leads to greater value for both your clients and your practice—just in time to invest in those holiday must-haves.

Here's to the season of giving and receiving - with gratitude all around,

Geni



Advisory Training - Purple Friday Discount

If you have been following me and the [Impactful Advisor Training Program](#) for a while and are on the fence about whether or not to take the leap to get trained in advisory services - this is the right time - It's "Purple Friday" y'all.

The [DIY Training Program](#) is normally \$1800. ***Through next Friday (12/6), I am offering DIY Training for only \$1200 (payable in three installments).***

Use discount code PURPLE by 12/6/24 to access the special price.



Question of the month:

Ask your clients about their sales processes and related challenges. Then help them quantify the impact by asking these questions:

- How much is it costing you to have this issue continue?
- How much stress is this adding to your life?
- Is this issue taking resources away from other areas of the business?
- How much has this issue cost you so far?

- Is anyone else affected by this issue as much as you are?



Upcoming speaking events:

12/4 Online: [I Talk Tech - Platinum Series with Geni Whitehouse & special Guests Wolters Kluwer](#)

12/9-12/11 Live: [Digital CPA](#) (attending only)

12/18-12/19 Online: [Ensuring Success](#) live-streamed CPA Practice Advisor



Listen Up

October was a whirlwind of conferences for me. One that was close to home was [Botkeeper's AI Unchained](#) held in the Sonoma Valley. If you feel like you are struggling to maintain balance, you are not alone.

[Watch: Walking a Tightrope Between Evolving Technologies and Traditional Accounting Practices](#)

where I was joined by the brilliant folks below to talk about the competing demands of our profession.

[Angie Grissom of The Rainmaker Companies](#), [Mike Maksymiw of Aprio Firm Alliance](#) & [Gail Perry of CPA Practice Advisor](#).



Gruyere Grits

It's that time of year where my low-carb diet goes out the window. There is nothing better than cheesy, gooey grits in the morning. Here's one such [recipe](#) you can share with your family.

Don't blame me if you have to get a new (larger-sized) wardrobe in time for your next holiday party.

Making an Impact

🎉 Congratulations 🎉 to Diane Leenders on completing her recent [Level 5 Advisory Training](#) and obtaining her AIA accreditation. Diane was part of my training Cohort that started back in May. We've been meeting online in monthly group sessions to go through the modules and discuss the tools & course material together.

She will be such an asset to her firm and to future clients now that she is a **Level 5 Certified Advisor!**



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