

A black and white photograph of a woman with long hair and glasses, wearing a dark cardigan over a white top. She is sitting at a desk, looking down and writing in a notebook with a pen. To her right, there is a stack of papers or folders. The background is slightly blurred, showing what appears to be a computer monitor on the left.

The Passionate Bookkeeper Defines Her Target Market

A Case Study

by Mary Jane Copps

The Business Situation

Shauntay Parsons owns Balanced Bookkeeping. When we spoke, the sound of her voice made it crystal clear that she is excited and focused on her work for her small business clients.

Originally from Atlantic Canada, Shauntay has spent 18 years in several large Canadian cities. She has recently returned “home” where she continues to work for her clients across Canada but now wants to grow her local presence as a resource specifically for small business owners.

With a background in finance and administration, Shauntay has a broad knowledge base and supports her clients beyond up-to-date bookkeeping. She helps them identify the right direction to grow their business, is always open to debating issues and looking at financial decisions from several different angles to make sure the client chooses what fits with where they want to go.

Sourcing Referrals

One way for Shauntay to grow her local client base, which might seem odd, is connecting with Chartered Accountants (CA's) that serve small businesses. I learned this years ago from my accountant. He tells me that good bookkeepers are like gold and that if I have a great bookkeeper, he wants to know about it. The one he refers most often can't take on any new clients!

To avoid becoming overwhelmed, Shauntay could structure her introductory phone calls to CA's by major city, i.e. Charlottetown, Halifax, Fredericton, St. John's. Here's what that phone conversation might sound like:

"Hi so and so, My name is Shauntay Parsons. The reason for my call ... as a busy CA in (city), I'm assuming you encounter small business owners that need help with their bookkeeping. I'm an experienced bookkeeper with existing clients across Canada. I specialize in working with small businesses and I've recently returned home to Atlantic Canada. I'm wondering, how might I become a bookkeeper you would recommend to your clients?"

I know – this is very straightforward. Which works because everyone is busy, including Shauntay. Possible responses will be ... *we don't work with very many small businesses* or *all of our clients already have bookkeepers* or *tell me more about your experience*. This last response is the one that inspires conversation and opens the door for Shauntay to be introduced to potential clients.

Networking for New Clients

The other option is to network with small business owners, build individual relationships with them, and talk to them about how they are handling their bookkeeping. Even in a time of social distancing, this type of networking is taking place online and it's possible to attend virtual events almost every day.

Shauntay could start with one community and research various organizations and the online networking events they are hosting. Chambers of Commerce, community networking groups, professional organizations ... many of these will be hosting regular online networking events.



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