

GENERAL INFORMATION

Name: _____ Practice Name: _____

Address & Postcode: _____

Phone No: _____ Mobile Number: _____

Email: _____ Web Site: _____

Are you a member of **AVN, Pro-biz** or **20/20**: _____ Position Held: _____

Years Practice is established: _____ Chartered / Certified / Other: _____

Number of Partners: _____ Number of Staff: _____ Number of Offices: _____ FSA Authorised: _____

PRACTICE INFORMATION

Who would be Advance Xtra's main point of contact for getting regular updates and feedback: _____?

Please advise us of the partner's name and their age that will be attending meetings: _____?

How many client referrals have you received in the last 12 months from existing clients: _____?

Where do you get the majority of your new clients from: Networking, Referrals & Recommendations Etc.: _____?

Would you be interested in buying a block of **GRF** from another practice, **if yes** how much: £ _____

On a scale of 1 to 10, how strong would you rate your own personal tax knowledge: _____?

Roughly in total, how many clients do you currently work with at the moment: _____?

What is your average **GRF** revenue per client: £ _____?

Have you done telemarketing before, if yes, who did you use and was it successful: _____?

Please name other telemarketing companies used, if any: _____?

How long did you use them for: _____? What was your conversion ratio at the time: _____?

How much GRF did you last telemarketing campaign produce for you in terms of new fees: £ _____

Would you like free access to our network of tax mentors to earn additional income from your clients at no cost: _____?

Do any of your clients currently achieve a net profit of £90,000 or higher, if so how many: _____?

Realistically, what percentage of your existing clients would you say are primarily tax focused: _____%

How soon would you like to start meeting new prospects through the Advance Xtra Network: _____?

On a scale of 1 to 10 how satisfied with your current website are you: _____?

CLIENT INFORMATION

Please fill in the appropriate box with the amount of clients that you are currently working with within these sectors:

Business	Number	Private Clients	Number
Limited Companies Turnover £5m plus	<input type="text"/>	Directors/Partners	<input type="text"/>
Limited Companies Turnover £2m - £5m	<input type="text"/>	Personal Tax Only	<input type="text"/>
Limited Companies Turnover up to £2m	<input type="text"/>		
Partnerships	<input type="text"/>		
Sole Traders	<input type="text"/>		

What is your personal **Unique Selling Point**, and how will it benefit or add value to a new potential client. What makes you different to other accountants in the area? Please list below

Does your practice specialize in any particular client trade/type? _____

Can you do evening (after 5.30pm) or weekend appointments if requested by the client: _____ (Yes/No)

Can you offer new clients a discounted fee rate for their first year as an added incentive: _____ (Yes/No)

ADVANCE XTRA INFORMATION

We do also offer a separate high value follow up call service for a small admin fee of **£35** plus vat. This will then enable us to call back and obtain the prospect's direct feedback from within 5 working days of your quote letter been sent. We find this speeds up the conversion process and will improve the accountants overall sign up ratio, simply because we would have full control of the appointment from start to finish: Do you wish to include this service: _____ (Yes/No)

Would you be interested in disposing any of your existing **GRF** privately, if yes how much: £ _____

Do you currently have indemnity insurance: _____? **If yes**, when is your renewal date: _____?

What software do you currently endorse or recommend to new or existing clients: _____?

What percentage of your existing clients would you estimate use the software supplied by you: _____%

Would you be interested in trying a **free trial** of the **Kashflow** software: _____?

Have you considered going paperless: _____? Would outsourcing your accounts be something of interest to your practice: _____? If yes, we can offer you a completely free trial for up to **5 of your existing clients** just to show you how quick the turn-around is and also what the quality of work is like. Would you like to try our free trial: _____?

Would you be interested in raising any finance for your practice, if yes how much would you like to raise: £ _____