

BUY, SELL, MERGE

Selling Your Firm is No Longer Easy

MUCH HAS CHANGED IN THE PAST TWO YEARS. SOLE PRACTITIONERS THINKING TOWARDS AN EXIT CONSIDER THE FOLLOWING:

- **Professional Advice:** Engage experts in accounting firm sales and acquisitions for a smooth/efficient process.
- **Emotional Support:** Be warned that selling your firm unpacks many unforeseen emotions and is often highly unsettling. Expert support is key to success.
- **Effective Planning:** Few Sole Practitioners know the full options they can consider and default blindly into a straight buy/sell agreement.
- **Valuation Expertise:** Seek professional valuation expertise to determine a fair and realistic value for the firm and avoid being taken advantage of.
- **Finding the Right Buyer:** Don't be manipulated by a buyer that doesn't have the best interests of you, your clients, or your team at heart. Proceed wearily.
- **Client Communication:** Be clear on your communication strategy with clients and employees, and don't create unnecessary fear or anxiety. Proceed intelligently.
- **Know your key objectives:** Be clear on what you want to achieve. Avoid being talked into an outcome you may ultimately regret.

Selling your accounting firm is often a once-in-a-lifetime experience. It should not be approached like a run-of-the-mill project. Seek genuine expert advice. A smooth and extremely positive transition is possible with the right approach and support, safeguarding client relationships and your incredible legacy and reputation.

Thinking about it? [Register your interest here!](#)

RECRUITMENT

Stephen D: The Power of Headhunting

In public accounting, talent is everything. But how do you attract and secure genuine talent? Enter Headhunting and Executive Search. How is it different to Recruitment, and why does it work?

The Backstory: Our client was a multi-site firm with a leadership gap in their growing firm. They needed an absolute star candidate. Someone who not only wanted equity but wanted to spearhead the entire business. Traditional recruitment methods were not likely to source such an individual in today's war for talent. Solution? Embark on a full-blown targeted executive search project. It took a few months to identify a short-list of genuine prospects and some time to create confidence for both parties (client and candidate). The outcome: Nine months later, the firm had secured its new managing partner, with an equity potion to be triggered on his first anniversary from commencement.

Headhunting Defined: It's a specialised recruitment method for spotting top-notch professionals, not actively job hunting.

Headhunting secures top talent, fostering harmonious matches between professionals and firms in public accounting.

READ ON: (What follows on pages 2-3)

- *Our Awards Night – The Inner Circle Club September 4th 2023*
- *Tailoring Content Marketing To Your Ideal Client Avatar*
- *What's Coming Up Next*

EDUCATION, CONSULTING & MENTORING

Our Awards Night – The Inner Circle Club September 4th 2023

Entrepreneur of the Year Award: Peter Gestos

Congratulations to Peter Gestos who won our Entrepreneur of the Year Award! A visionary entrepreneur who achieved a remarkable double turnover, during the challenging times of the COVID-19 pandemic. With unwavering determination, Peter pivoted his company to adapt to the challenging landscape. Peter's resilience and forward-thinking approach has led his company towards success, post-pandemic.



National Firm of the Year Award Winner (Multi-Partner): Professional Business Solutions

Congratulations to Professional Business Solutions on winning our National Firm of the Year Award (Multi-Partner)! A thriving firm with three dynamic partners making waves in the financial industry. With over 30 years of industry experience, their journey has been nothing short of remarkable. What sets them apart is their commitment to fostering an extraordinary team culture, their passion and expertise that fuels collaborative work in delivering excellence for the business.



MARKETING

Tailoring Content Marketing To Your Ideal Client Avatar

In the ever-evolving social media world, effective content marketing isn't merely about broadcasting messages. By understanding and addressing your Ideal Client's Avatar (ICA's) specific needs and pain points, you elevate your strategy from generic to genuinely impactful. Here's how to hone that focus:

Value-Driven Content: Dive into the psyche of your ideal client. What are their challenges, aspirations, or questions? Tailor content that's engaging and directly addresses these points, creating a robust and relevant connection.

Consistency with Purpose: Regular, ICA-focused content maintains their engagement and fosters trust. A content calendar reflecting the concerns and interests of your ICA ensures you're always on target.

Assessment and Adaptation: Analytical tools become even more powerful when filtered through the lens of your ICA. Monitor content effectiveness by how well it resonates with this avatar, refining your approach based on these insights.

With a keen understanding of your ideal client's pain points and aspirations, your content marketing can become a beacon of relevance and value. For a deeper dive into aligning with your ICA, we're here to share more insights.

Reach out to us today! Click [HERE](#).



WHAT'S COMING UP NEXT?

OCT 12

BEST PRACTICE LEADERSHIP PROGRAM

Manage Your Money, Manage Your Life

1:00 PM - 4:00 PM AEST

For October, our Leadership Program for Accountants and Business Owners is focused on "Manage Your Money, Manage Your Life".

[TO LEARN MORE, REACH OUT TO US HERE!](#) (Calendly)

OCT 17 - NOV 21

QUALITY ASSURANCE

6-WEEK ACCELERATOR



"Working above the line"

Week 1: Tuesday 17th October

12:00PM - 1:30PM AEST

Strategic Planning and Building Scale

Week 2: Tuesday 24th October

12:00PM - 1:30PM AEST

Business By Design Rather Than By Default

Week 3: Tuesday 31st October

12:00PM - 1:30PM AEST

Leadership Culture & Change Management

Week 4: Wednesday 8th November

12:00PM - 1:30PM AEST

Marketing, Social Media and Growth Strategies

Week 5: Tuesday 14th November

12:00PM - 1:30PM AEST

Talent, Performance and Structure

Week 6: Tuesday 21st November

12:00PM - 1:30PM AEST

Graduation and What You Should Do Next

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Private Consulting

- Growth Strategy Workshops
- Succession Planning
- Strategic Planning Workshops
- Practice Development Plans
- Sales Training

Buy Sell Merge

- Buying An Accounting Firm
- Selling An Accounting Firm
- Merging Your Accounting Firm
- Valuations: What's My Firm Worth?

Marketing

- Digital Audits
- Growth Strategies
- Customer Care
- Social Media

Recruitment

- Advertised Search
- Executive Search
- Personality Profiling

Success By Design

- Staff Appraisals
- Structure Review
- Technology Audits
- Tech Stack Consulting

BEST
PRACTICE

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