

TRUST

TRUST is a leading edge solution helping accountants leverage their time to manage workflow and resources in a truly effective way.

“ My accountants use a product called TRUST to help them to identify and prioritise my needs as a client. ”

Rob Nixon speaking at his '7 Keys to Building a Successful Accounting Business' workshop

What is TRUST?

TRUST is an automated web-based solution that enables accounting firms to understand precisely what clients want from the firm. Clients identify their needs by completing online assessments assigned to them by their accountant. Client responses to these assessments allow TRUST to generate a client assessment report to help you to uncover the areas where clients would most appreciate and benefit from your expertise. This report also identifies potential risks and opportunities with which you may want to help your clients.

TRUST helps accountants market and sell services that address client needs AS IDENTIFIED BY THE CLIENT leading to additional assignments that generate more revenue and profitability for your firm.

How to build revenue and keep your engine room busy

TRUST is the only client assessment application in our marketplace which allows firms to comprehensively market and promote their services to selected clients and prospects.

- Transform your client meetings by qualifying clients' and prospects' needs before you meet with them.
- Present your recommendations confidently using an organised thought-process contained in a detailed report.
- Have clients leave planning meetings certain of next steps, backed up with a copy of your documented findings and high likelihood that they'll be working with you to achieve the outcomes.

The focus is on defining and solving client problems, NOT selling services.

TRUST consistently improves conversion rates of new clients AND expands the scope of services offered to them. It also works wonders to strengthen existing client relationships and ensure all client needs are being addressed.

Running the TRUST client assessment system is not partner-dependent. TRUST provides a consistent and proven needs-analysis and selling process for every accountant on your team. TRUST comes with three pre-customised assessment templates tailored specifically for the accounting profession. Or further personalise TRUST by creating your own assessment templates, questions, actions and recommendations.

If you're developing joint ventures with other professionals such as financial planners, TRUST plays a vital part in that process too.

Matt Schlyder, Managing Partner of Elliotts in Brisbane says, "Since implementing TRUST in July 2007, we haven't looked back. We recouped our cost in one assignment. In five short months we achieved 50% of our inaugural target for the year. Around 30% of clients invited into the process generated further work from their assessment. This produces an average of about \$600/hr minimum".

VBD Chartered Accountants rated TRUST as, "It is a great tool notwithstanding that it asks many of the questions we should already be discussing with our clients".

Find TRUST at
www.renewgroup.com.au

Request a trial client assessment and sample client assessment report by calling TRUST Support on 0400 335 462 or email wendy.gleeson@renewgroup.com.au.

