

# Discovery Questionnaire — Accounting & Bookkeeping Firms

**Goal of the call:** leave with five numbers. Everything else is conversation.

| # | The number                                               | Where it comes from |
|---|----------------------------------------------------------|---------------------|
| 1 | Active clients                                           | Q2                  |
| 2 | Documents per client per year                            | Q4                  |
| 3 | Hours per week spent chasing                             | Q5                  |
| 4 | Who does the chasing, and their rate                     | Q6                  |
| 5 | Extensions filed last season because documents were late | Q8                  |

Those five numbers price the deal for you. Do not quote a price on this call unless asked — book the free Chasing Audit and price it afterwards.

## Opening (30 seconds, say it plainly)

“We work with accounting firms on one specific thing: the chasing. Not the returns — the part where you’re emailing a client for the third time about one missing slip. I’ve got a few questions about how that works in your firm, and at the end I’ll tell you honestly whether we can help.”

Then stop talking. Let them talk.

## The questions

**Q1. How many people are in the firm, and how many prepare returns?** *Why: owner-operators of 2-15 staff are our buyer. Bigger firms usually have an ops manager and a longer cycle — note it and move on.*

**Q2. Roughly how many active clients do you handle?** *Why: scales the engagement. Under about 80 clients the pain is real but the ROI won’t carry \$800/month yet — that’s a “later” list, not a no.*

**Q3. Walk me through what happens when a client’s documents come in. Where do they land?** *Why: reveals the actual mess — a portal, an inbox, a shared drive, or all three. Listen for “scattered”, “some by email”, “it depends”.*

**Q4. On average, how many documents does one client owe you?** *Why: the volume multiplier. 200 clients × 6 documents is 1,200 touchpoints a season — that number lands hard when you say it back to them.*

**Q5. During busy season, how many hours a week does someone spend chasing missing documents?** *Why: the single most important number. If they say “I don’t know”, say: “guess — two hours? Ten?” Most say four to eight. Write down exactly what they say.*

**Q6. Who actually does that chasing?** *Why: if it’s the partner or the most senior preparer, the cost is highest and the pain is sharpest. That is our best buyer.*

**Q7. How do you currently know what’s still missing on a given file?** *Why: if the answer is “a spreadsheet”, that’s the opening. If it’s a portal, go to Q7b.*

**Q7b. (If they name a portal) When the portal reminder doesn’t work and the client still hasn’t sent it, what happens next?** *Why: the honest answer is almost always “then someone emails or calls them”. **That somebody is what we replace.** The portal sends the reminder; we*

run the chase that follows. This is the difference between us and software they already own.

**Q8. Last season, how many returns did you extend where the client had actually sent everything you asked for — just late?** *Why: the emotional question. It reframes the pain from “some admin” to “we filed extensions for people who did nothing wrong”.*

**Q9. When a client goes completely silent for two weeks, what do you do?** *Why: reveals whether any escalation discipline exists, or whether it just sits there. Our product is\* the escalation ladder.\**

## What NOT to say

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- **Never give tax advice**, even if you know the answer. “That’s your call — I only handle the chasing.”
- **Never claim we have accounting clients already**. We don’t yet. Say: “we’re new to this niche, and that’s exactly why the audit is free.”
- **Don’t quote prices on the discovery call**.
- Don’t say “AI” more than once. Say “automated”.

## The close — the free Chasing Audit

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“Here’s what I’d like to do. Give me last season’s client list and what each one owed you. In three days I’ll send back a one-page count: how many document touchpoints you ran, how many stalled past the point work could start, and what those hours cost at your own rate. No charge, and you keep the page whether or not we work together.”

**Why this works:** it’s specific, it uses *their* data, it’s verifiable, and it costs them nothing but a file export. It proves the product before they buy — and critically, **it can be delivered entirely by email**, so it doesn’t depend on anyone picking up the phone.

## Immediately after the call, record

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Client count · documents per client · chasing hours/week · who chases · their hourly rate · extensions caused by lateness · current tracking method (portal / spreadsheet / nothing) · and one verbatim quote about the pain.