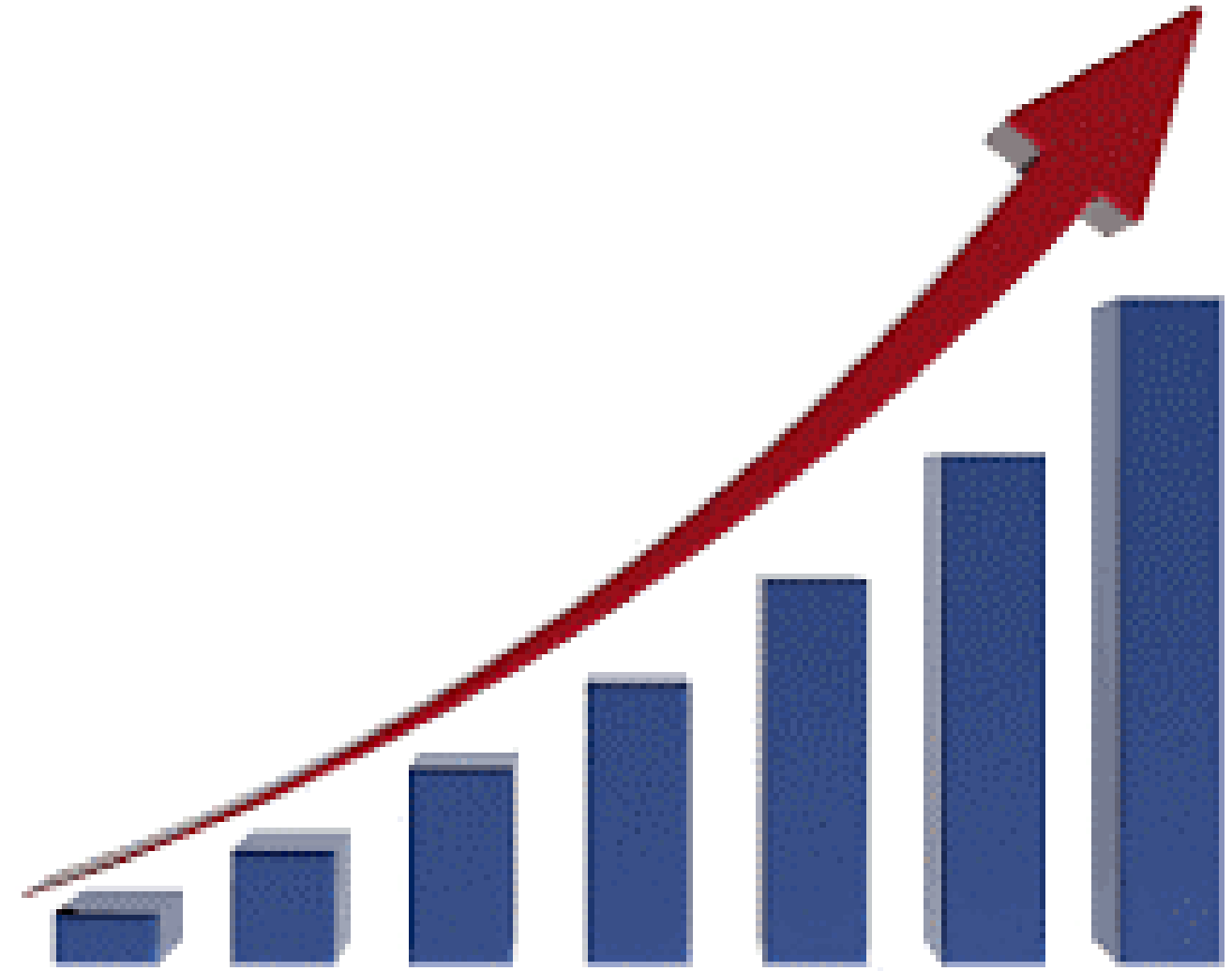


# Practice Management





Chris Spafford, founder of Frabul, LLC, empowers businesses at every stage—from startup to exit—with tailored business development solutions that drive sustainable growth and long-term value. By combining scalable sales and marketing infrastructure, fractional leadership, executive coaching, team development, and exit planning, Frabul delivers the strategic clarity, operational discipline, and executional support needed to accelerate performance and maximize enterprise value.

Chris lives in Wilbraham, MA and supports clients both in-person and virtually. He is a lifelong learner who believes in continuous self-improvement.

## Frabul, LLC

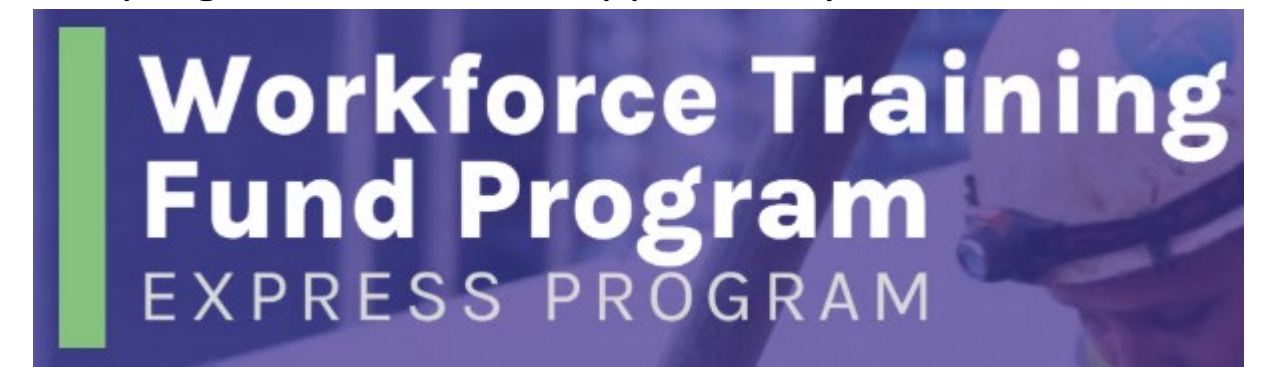
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All programs have been approved by the



Fractional Business Leadership ♦ Design and Implementation of Business Development Infrastructure ♦ Strategy ♦ Process  
♦ Analytics ♦ Sales Training Programs ♦ Organizational Development ♦ Sales and Marketing Recruiting ♦ Exit Planning

# PRACTICE MANAGEMENT CHALLENGES



# Unique Value Proposition

Strategy | Process | Execution

**Your competition is formidable:**

In Massachusetts alone there are:

- Over 11,000 CPAs
- Over 8,800 Financial Advisors
- Over 2,400 Estate Planning Attorneys

**What is your Unique Value Proposition?** Clients don't buy similarities – they buy differences.

WIIFM



# Structure of a UVP

Strategy | Process | Execution

## STRUCTURE OF A VALUE PROPOSITION

[Company] helps [customer] [get results] by [solution] .

Examples:

- Walmart helps local customers save money on a broad range of goods that are always in stock in convenient locations.
- General Motors North America helps American drivers find a quality vehicle to meet their needs by offering outstanding warranty coverage, roadside assistance and courtesy transportation to keep you on the road.
- BMW helps performance-driven car owners get the Ultimate Driving Experience TM through technology enabled luxury cars with "No Cost Maintenance" for the first 4 years/50,000 miles.

# Prospecting For New Business

***"Getting Deeper and Wider"***

# B2C Customer Lifecycle

Strategy | Process | Execution

## Customer Lifecycle Marketing for B2C Companies

Here is a list of digital marketing activities that should be carried out by businesses to engage prospects and customers across their path to purchase.

### B2C Digital Marketing Activities

Customer Engagement

Time

LEAD GEN

SALES

#### Awareness

- › Social/Search Engine Advertising
- › Email/SMS Marketing
- › Television
- › Radio
- › Newspaper/Magazine
- › Billboard
- › YouTube/Video Ads
- › Online Display Advertising
- › Word of Mouth
- › Events
- › Search PPC
- › Content Marketing

#### Interest

- › Social Media
- › Blogs & Articles
- › Reviews & Testimonials
- › Influencer Marketing

#### Desire

- › Affiliate Marketing
- › Re-marketing
- › Cro

#### Action

- › Salespersons
- › Omnichannel Campaigns

#### Loyalty

- › Loyalty Programs
- › Re-engagement Emails
- › Customer Satisfaction Surveys

#### Advocacy

# 3 Principles of Prospecting:

**1. Who They Are –** Ideal Client Profile

**2. Where They Are**

- Current Customers
- Referrals
- Networking / Social Media
- Cold Calling
- Other

**3. It Never Ends**





Referrals

# Increasing Your Referrals

***"Don't wait for it to happen,  
make it happen"***

# What is a Referral?

**“Sending Someone you Care About  
to Someone you Trust”**

## Why Don't People Ask for Referrals?

### **1. Fear of Rejection**

*...They're afraid the Client  
will feel Put-Out*

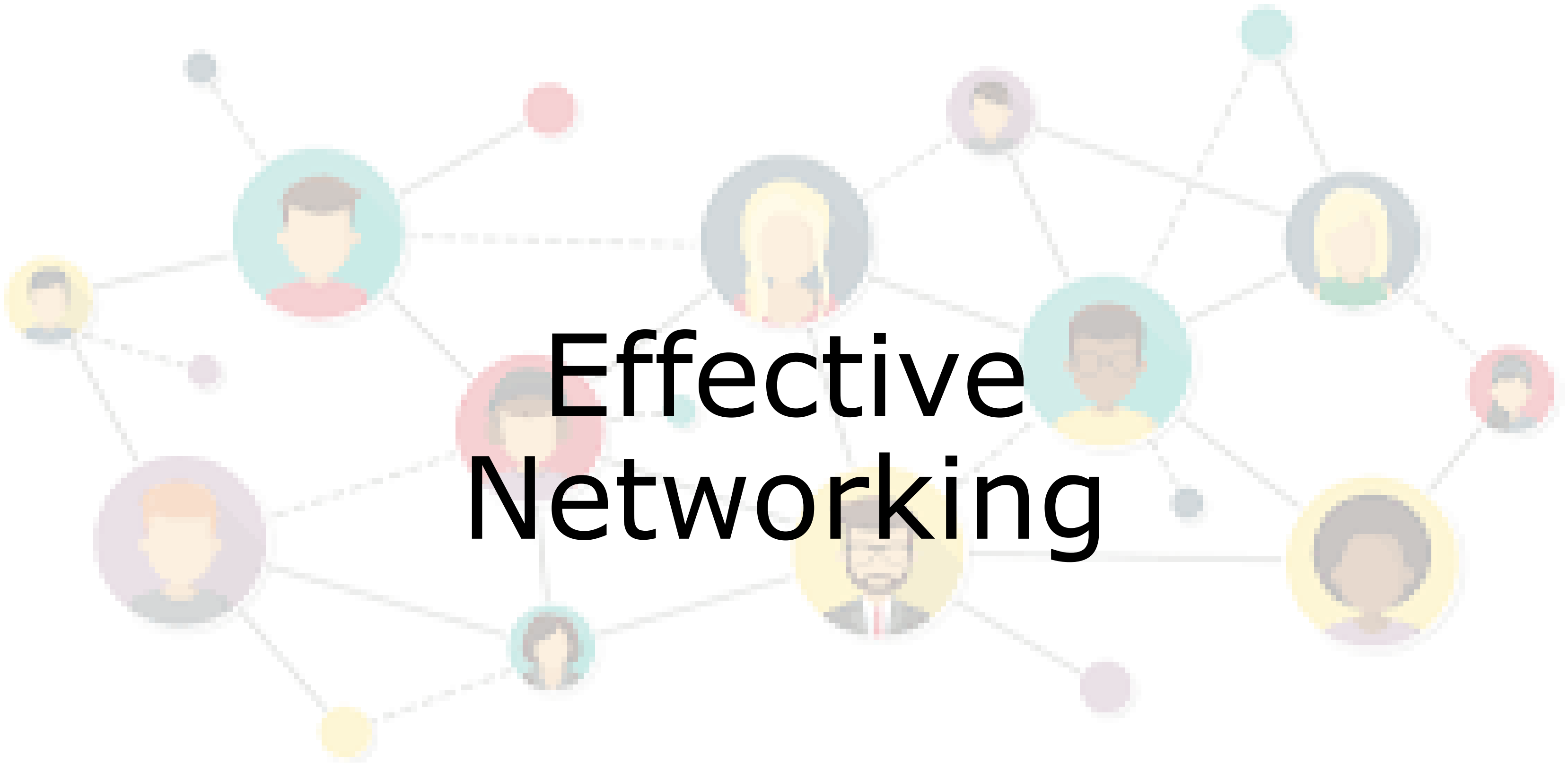
### **2. Don't Know How**

# Referral Sources

Strategy | Process | Execution

- Current Clients (Active)
- Networking Events (Passive)
- Networking Partners (Passive)

How are you nurturing these referral sources?



# Effective Networking

### Defining and Communicating a Clear UVP

1. Be able to explain what you do in plain, client-friendly language (no jargon).
2. Tailor your introduction to highlight the problems you solve and who you serve best.
3. Clarity makes it easier for others to recognize referral opportunities for you.

### Listening More than Talking

1. The best networkers uncover needs, pain points, and goals by asking open-ended questions.
2. Show genuine curiosity about the other person's clients, challenges, and ideal prospects.
3. People remember when you make them feel heard and understood, not when you pitch.

### Building Trust Before Asking for Business

1. In professional services, credibility and reputation are everything.
2. Demonstrate expertise through thoughtful conversations, case examples, and value-driven insights.
3. Focus on being reliable and consistent—trust often precedes referrals by months (or years).

### Positioning Yourself as a Connector

1. Don't just collect contacts—actively connect others in your network.
2. Be known as the person who helps people find the right resource, even when it's not you.
3. Giving first (introductions, advice, opportunities) builds reciprocity and strengthens your influence.

### Practicing Consistent Follow-Up

1. The fortune is in the follow-up: schedule coffees, share relevant articles, send quick check-ins.
2. Use a simple system (CRM, spreadsheet, or reminders) to stay visible without being pushy.
3. Relationships fade if they're not nurtured over time.





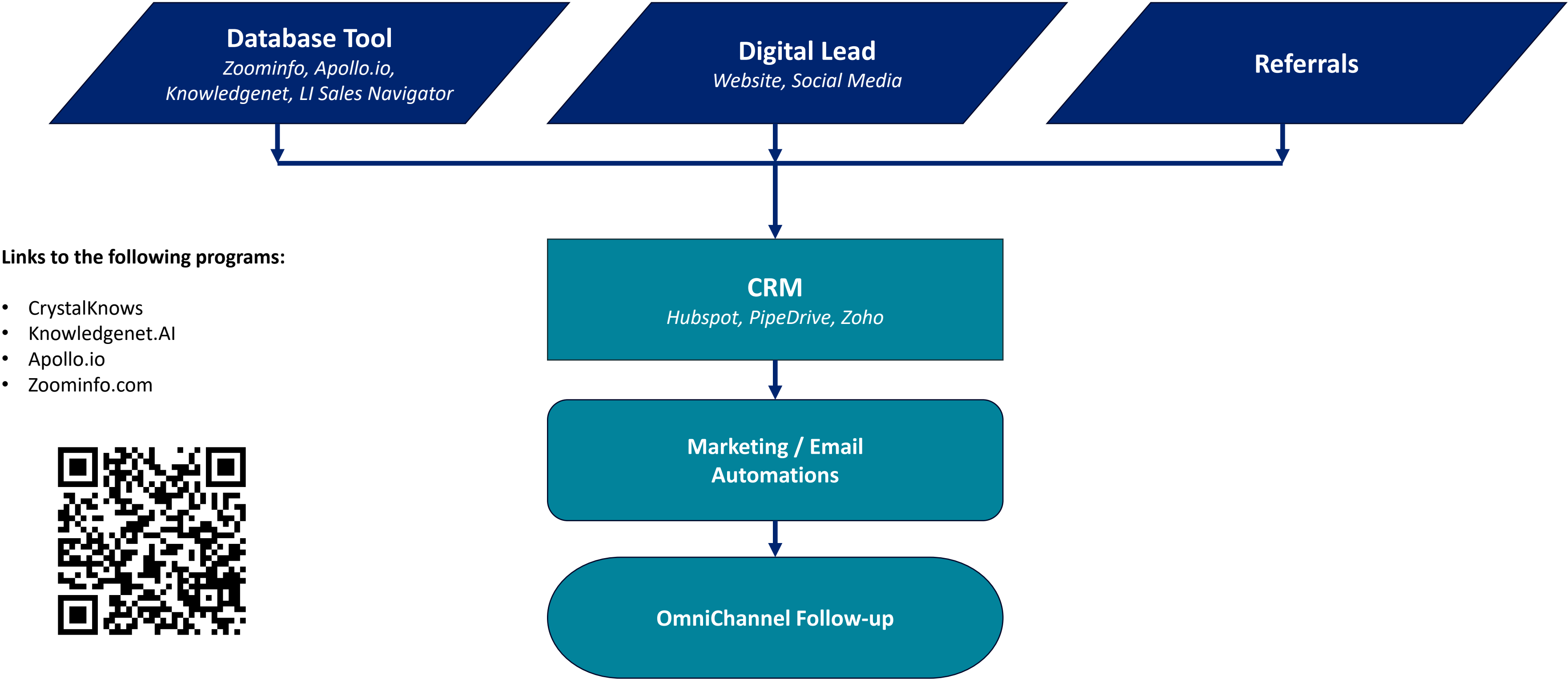
Lead  
Conversion  
Rate

# Increasing Conversions

***"Process Control allows for measurement  
and improvement"***

# Tech Stack

Strategy | Process | Execution



# Diving Deeper: 7-Step Sales Process



## Consider documenting in a Sales Playbook

### Benefits of a Sales Playbook:

- ✓ **Consistency**  
Ensure every team member follows the same winning playbook.
- ✓ **Sales Efficiency**  
Sales resources are organized to streamline your sales process.
- ✓ **Higher Close Rates**  
Equip your team with winning strategies, messages, and templates for every stage of the sales cycle.
- ✓ **Enhanced Training**  
Accelerate onboarding and continuous development with built-in resources.

### Table of Contents

SALES STRATEGY	
• Company Overview	• Competitive Positioning
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• Hot Leads vs. Cold Leads Checklist	• Handling Objections
SALES PROCESS*	
• Sales Cycle Stages	• Outreach Messaging
• Key Sales Metrics	• Sales Resources

# Link to Helpful Information

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**On the web page you will find:**

- Links to free program trials
- Link to the MA Express Grant information page
- Link to my business profile

