CR Squared

MICHEAL BURCH

FCPA, FCA, CFP RETIRED

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Business Development *Training*

PROGRAM FOR DRIVEN CPA PROFESSIONALS

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Executive *Summary*

Firms invest heavily in technical training but often leave business development to chance. This program provides a structured system that helps younger CPAs become visible in the marketplace, build trusted relationships, and develop new business without becoming traditional salespeople.

After completion participants will:

01

Build a professional digital presence

02

Develop a local referral network

03

Conduct effective prospect meetings

04

Create a repeatable business development habit

Program *Purpose*

This four-part program helps driven CPA professionals develop the habits, visibility, confidence, and relationship skills required to become trusted advisors in their local markets.

The program is designed for emerging professionals who may not yet see themselves as business developers. The goal is not to turn them into salespeople. The goal is to help them become visible, curious, useful, and trusted members of the business community.



The CR Squared *Growth Method*

PHASE 1 VISIBILITY

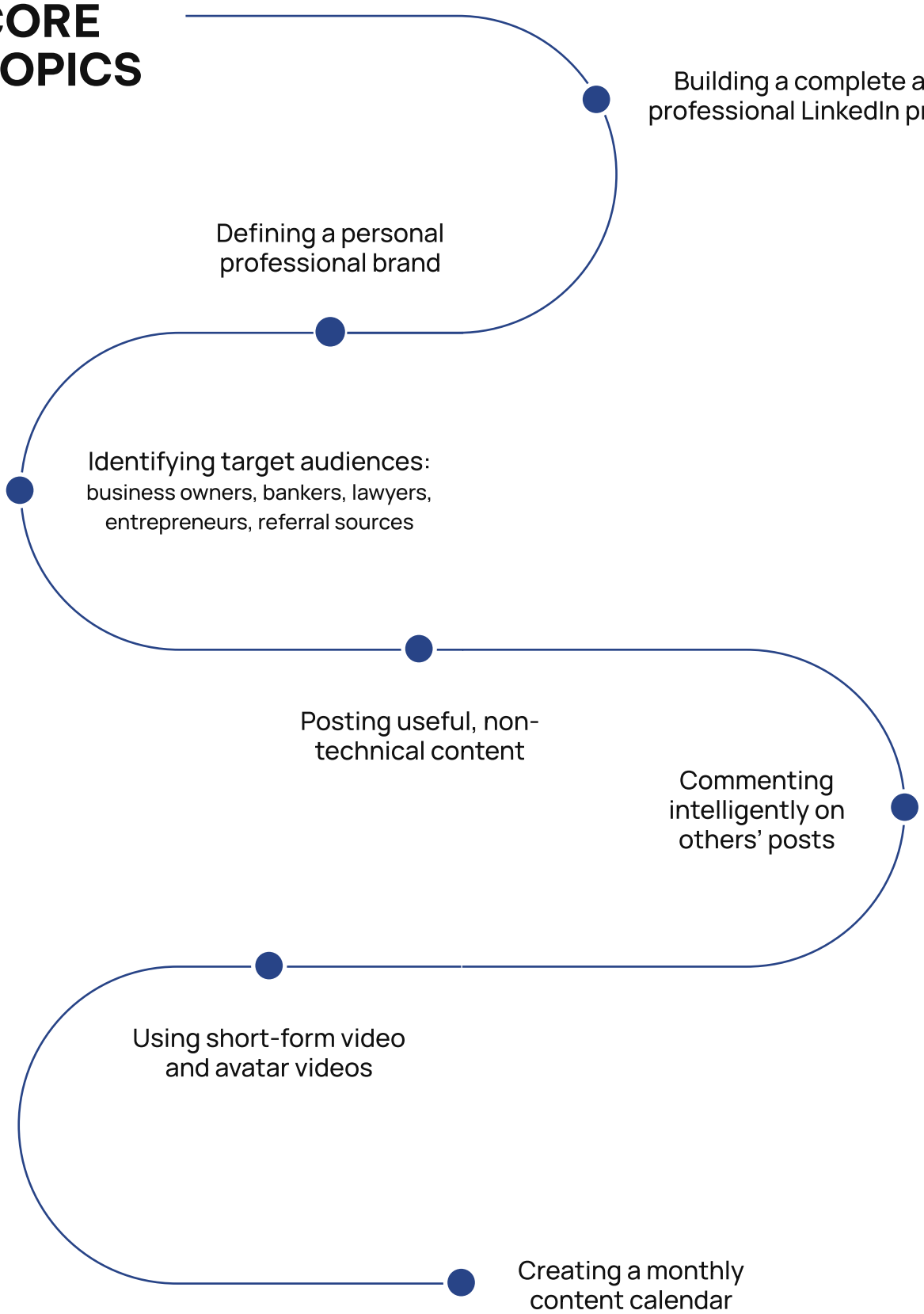
Build a Professional Digital *Presence.*

Professionals cannot become trusted advisors if no one knows they exist.

OBJECTIVE

Help participants become visible and credible online, especially on LinkedIn and other relevant platforms.

CORE TOPICS


Building a complete and professional LinkedIn profile
Defining a personal professional brand
Identifying target audiences: business owners, bankers, lawyers, entrepreneurs, referral sources
Posting useful, non-technical content
Commenting intelligently on others' posts
Using short-form video and avatar videos
Creating a monthly content calendar

AVATAR VIDEO COMPONENT

Participants learn how to utilize short avatar-based videos for:

- Industry updates
- Event invitations
- Tax reminders
- “What business owners should know” commentary
- Follow-up messages after networking
- Business planning tips

*Production of the avatar is priced separately.

PARTICIPANT ASSIGNMENTS

01 Update their LinkedIn profile.	**02** Identify 100 local business and referral contacts to follow.	**03** Publish one introductory post.
04 Comment meaningfully on 10 local business posts per week.	**05** Create one 60–90 second avatar video (additional cost).	

SUCCESS MEASURES

- LinkedIn profile completed
- Number of posts/ comments made
- Engagement generated
- Avatar video completed
- Number of new local connections

PHASE 2 COMMUNITY

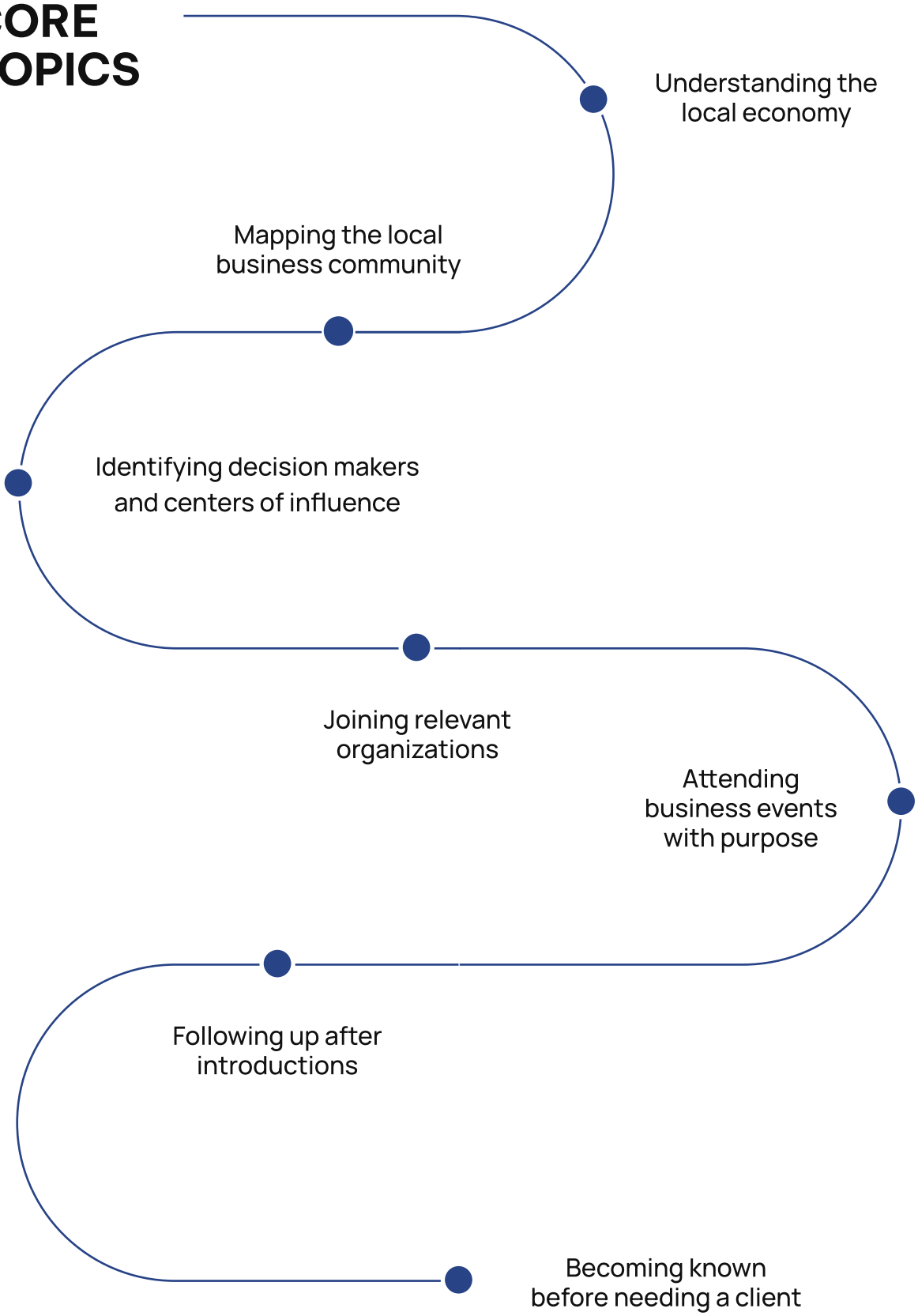
Establish a Local *Presence.*

Visibility in the community creates opportunities before prospects need a CPA.

OBJECTIVE

Teach participants how to become active, visible members of the local business ecosystem.

CORE TOPICS


Understanding the local economy
Mapping the local business community
Identifying decision makers and centers of influence
Joining relevant organizations
Attending business events with purpose
Following up after introductions
Becoming known before needing a client

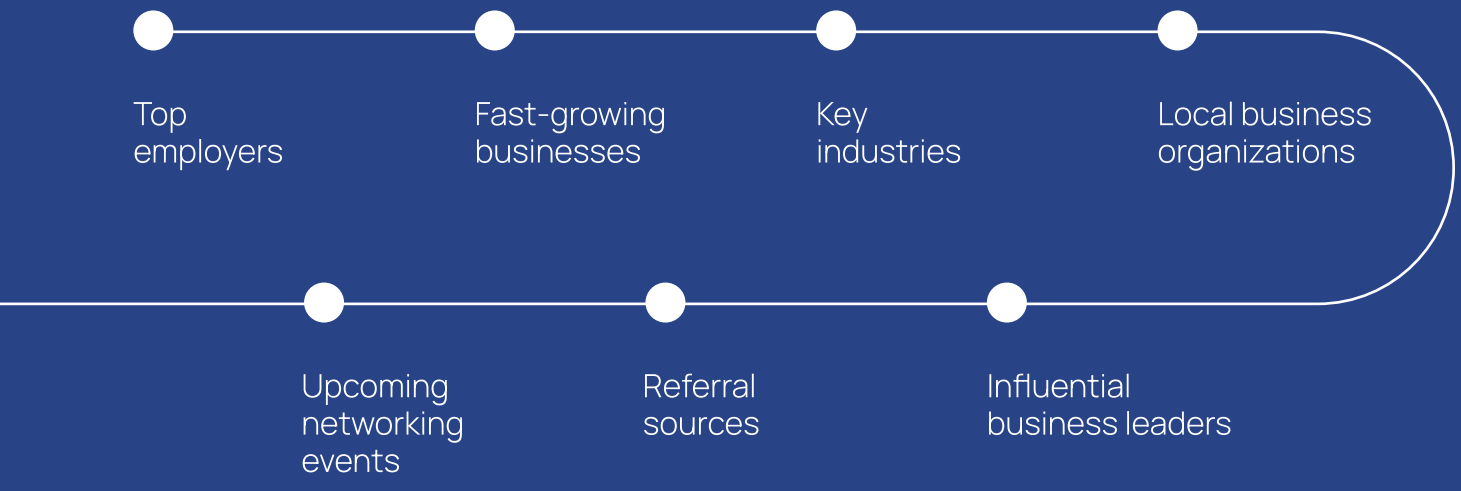
TARGET GROUPS

Participants should identify and engage with:

Bankers & Lawyers	Insurance advisors
Industry association leaders	Nonprofit and community leaders
Business brokers	Real estate professionals
Entrepreneurs	Chamber of commerce leaders
Economic development officers	Wealth advisors

LOCAL MARKET MAPPING EXERCISE

Each participant creates a local market map that includes:



PARTICIPANT ASSIGNMENTS

01 Attend two local business events per month.	**02** Schedule one coffee meeting per week.	**03** Join at least one business or community organization.
04 Build a list of 50 local centers of influence.	**05** Prepare a short personal introduction.	

SUCCESS MEASURES

- Events attended
- New contacts made
- Follow-up meetings scheduled
- Referral sources identified
- Local organizations joined

PHASE 3 CONVERSATIONS

Prospect Conversations Using the *Solin-Inspired Approach.*

Great business development begins with curiosity, not persuasion.

OBJECTIVE

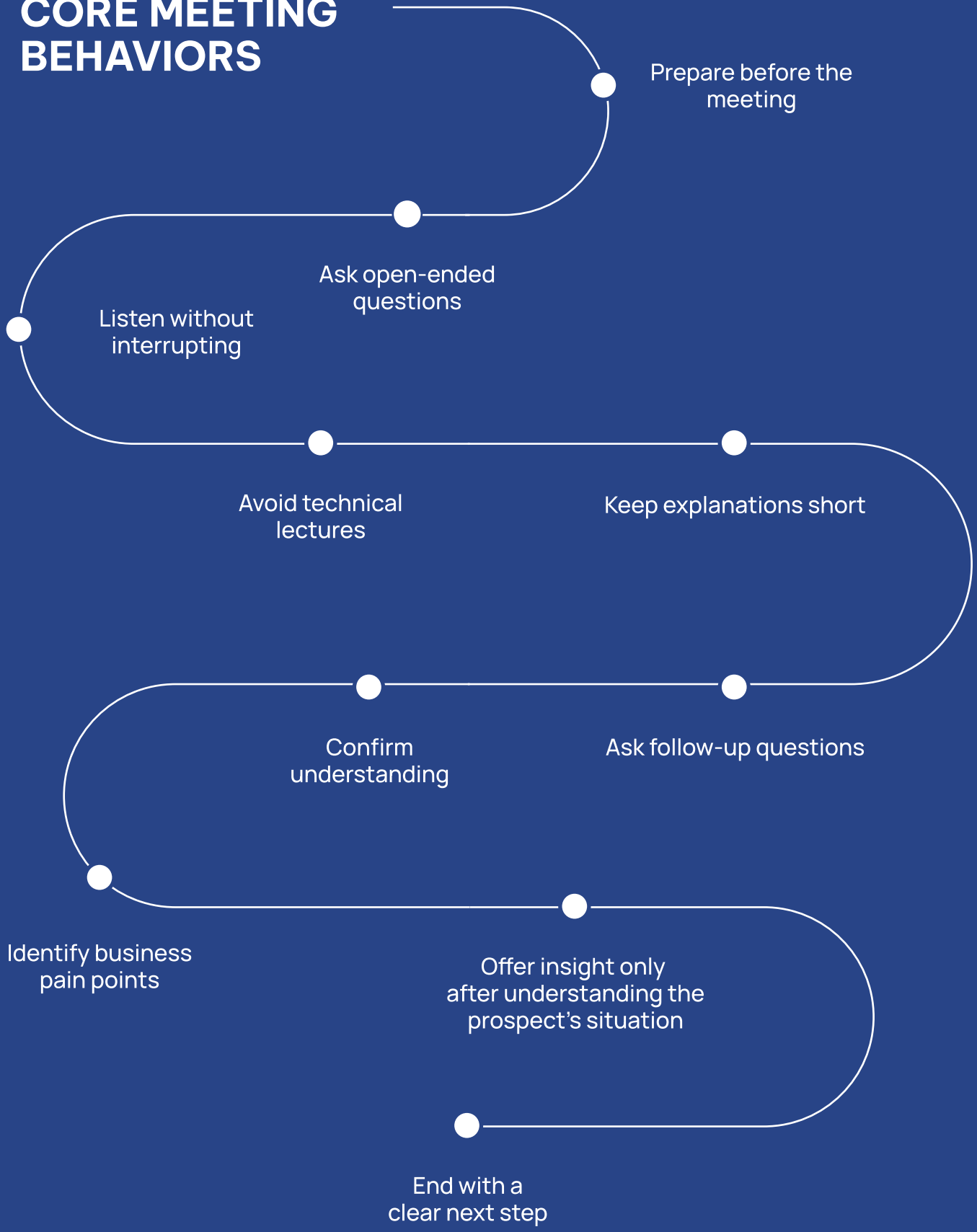
Train participants to conduct prospect and referral meetings that build trust through curiosity, listening, and thoughtful questioning.

GUIDING PRINCIPLE

The prospect should occupy center stage. The CPA professional should ask strong questions, listen carefully, respond briefly, and keep the conversation focused on the prospect's goals, concerns, and opportunities.



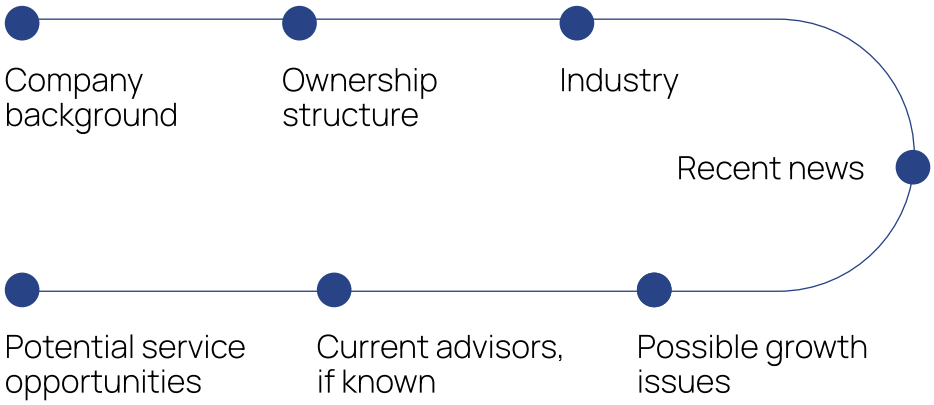
CORE MEETING BEHAVIORS



Prospect Meeting *Framework*

PREPARE

Before the meeting, research:



OPEN

Suggested opening:

"Thank you for taking the time to meet. I would like to learn more about your business, what you are focused on this year, and where you may be seeing opportunities or challenges."

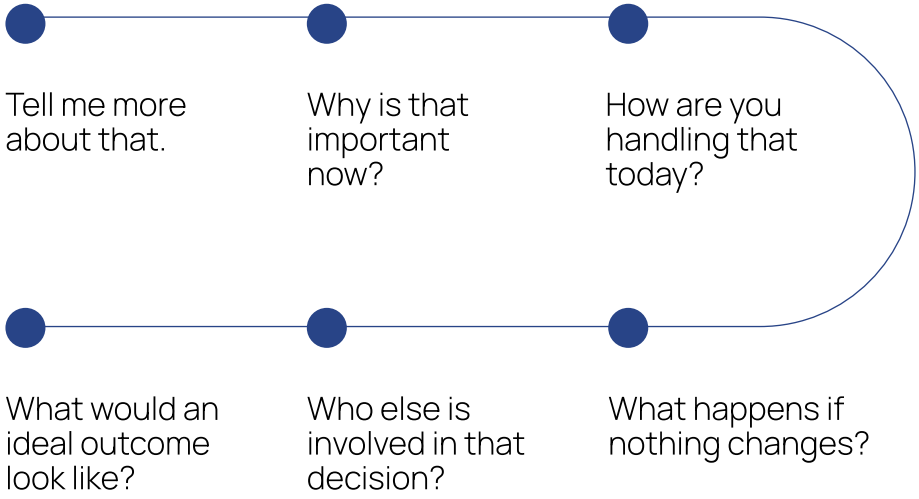
DISCOVER

Core questions: Tell me about your business.

- What are your biggest priorities this year?
- Where is the business growing?
- What is becoming more difficult?
- What financial information do you wish you had sooner?
- What keeps you up at night?
- What do you value most in an advisor?
- Where do you feel underserved by your current advisors?
- What would make this meeting useful for you?

CLARIFY

Follow-up prompts:



POSITION

Only after listening, the participant may briefly explain how the firm can help:

"Based on what you shared, there may be a few areas where we could be helpful: improving financial visibility, planning ahead for tax obligations, and helping you think through growth decisions."

CLOSE

Suggested close:

"I appreciate the conversation. A useful next step may be for us to review your current situation in more detail and identify where there may be opportunities to improve reporting, tax planning, or advisory support."

PARTICIPANT ASSIGNMENTS

01 Role-play two prospect meetings.	**02** Conduct one real-world coffee meeting.	**03** Submit a meeting preparation worksheet.
04 Submit a meeting debrief.	**05** Identify one possible follow-up opportunity.	

SUCCESS MEASURES

- Quality of questions asked
- Listening behavior
- Prospect needs identified
- Follow-up actions completed
- Confidence improvement

PHASE 4 MOMENTUM

Continuous Monitoring and *Reinforcement*

Habits create rainmakers.

OBJECTIVE

Ensure business development becomes a habit, not a one-time training exercise.

Monthly Reinforcement *Rhythm*

MONTHLY GROUP SESSION (Each month participants review)

New contacts made • Meetings held • Content posted • Lessons learned • Challenges encountered • Upcoming opportunities

INDIVIDUAL SCORECARD (Each participant tracks)

LinkedIn posts • LinkedIn comments • New connections • Events attended • Coffee meetings • Referral source meetings • Prospect meetings • Follow-up actions • Opportunities identified

COACHING (Each participant receives quarterly coaching on)

Personal brand • Market engagement • Meeting technique • Confidence • Follow-through

RECOGNITION (Recognize)

Most consistent networker • Best social media post • Best prospect question • Best follow-up discipline • Most improved participant

Recommended Program *Timeline*

Month *1*

Part 1: Digital presence and social media

Month *2*

Part 2: Local marketplace engagement

Month *3*

Part 3: Prospect meeting skills

Months *4-12*

Part 4: Monitoring, coaching, reinforcement, and accountability

Program *Deliverables*

01
Participant workbook

02
LinkedIn profile checklist

03
Avatar video guide

04
Monthly content calendar

05
Local market mapping template

06
Center-of-influence tracking sheet

07
Prospect meeting preparation form

08
Prospect meeting question bank

09
Meeting debrief form

10
Monthly business development scorecard

Next *Steps*

Schedule a discovery meeting

Customize the program if desirable

Select participants

Launch the first firm cohort

Testimonials and *Background*

MICHEAL BURCH

FCPA, FCA, CFP (RETIRED)

Micheal Burch joined Welch LLP in 1978 after earning his **Bachelor of Administration** from the **University of Ottawa,** obtaining his **CPA, CA** designation in 1981 and **CFP** shortly thereafter. He was named a **Fellow of CPA Ontario (FCPA, FCA)** in 2016.

Rising through the firm, Micheal became a **Partner in 1993** and served as **Managing Partner from 2008 to 2021,** leading Welch's Ottawa and Toronto offices through significant growth and strategic transformation. His expertise spans **corporate and personal taxation, cross-border consulting, financial and estate planning,** and **strategic management** of professional service firms.

In addition to his firm leadership, Micheal has contributed to **BKR International** through its Canadian Tax Committee, Member Value Task Force and as acting CEO. He is now **President and Founder of The Evolution Hub,** and the Director, CPA firm growth at CR Squared which provides strategic advisory services to professional firms.

Micheal's deep commitment to community service includes leadership roles with the **Ottawa Sports Hall of Fame, National Gallery of Canada Foundation, Ottawa Food Bank, Ottawa Senators Community Foundation Board, Perly Health Answering the Call Campaign and the Telfer School of Management, where he served on the Dean's Advisory Board.**

Honoured with the **Trudeau Medal** from the Telfer School of Management (2008), Micheal was also named **Business Leader of the Year** at the 2018 West Ottawa Business Excellence Awards.

An avid runner and lifelong athlete, Micheal enjoys playing guitar—often alongside his daughter—and values teamwork, mentorship, and community engagement as integral parts of both business and life.



Testimonials and *Background*

Micheal Burch is an innovative thinker that finds creative solutions to drive results and growth for professional service firms. His extensive experience, proven success and deep understanding of the industry coupled with his approachable leadership has made him a true leader in his field. I highly recommend Evolution Hub.

KYLE TURK

CEO, Meerkat Marketing

I have known Micheal for over 2 decades and observed when he was appointed Managing Partner of Welch taking that organization from being a lagging firm in our worldwide affiliation, BKR International, to being recognized as the best managed firm in the Americas. Micheal is a CPA but he is also a businessman, and a very good one.

KELLY LOHN FCPA, CPA

Founding Partner, Lohn Caulder LLP

Twelve-Month *Outcomes*

A full cycle of the program should change what participants do each week, not only what they know. These are the results a firm should expect to see by the end of the twelve months.

For the Participant

- A complete professional profile and a monthly content rhythm they maintain themselves
- A mapped local market and a working list of fifty centers of influence
- The confidence to open a conversation with a business owner without a script
- A practiced meeting framework: prepare, open, discover, clarify, position, close

Begin the *Conversation*

Schedule a discovery meeting to review the program, customize it to the firm, select participants, and launch the first cohort.

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Director, CPA firm growth CR Squared

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