

---

# Valued Merchant Services Lead Generation Script

*Detailed scripts focused on setting appointments and creating warm leads in specific vertical markets*

---

## CPAs, Accountants, Tax Firms

### INTRODUCTION (Build Rapport Quickly):

**Rep:** *Hi [Prospect's Name], this is [Your Name] calling from Valued Merchant Services. I hope I'm catching you at a decent time — I'll be quick!*

We work with accounting and CPA firms across the country to help simplify their client billing and card acceptance — often cutting costs, upgrading outdated tech, and improving cash flow visibility. Do you have a moment for a quick intro?

---

### (If YES or CURIOUS):

Awesome — I'll keep this short and helpful.

---

### VERTICAL-SPECIFIC PAIN POINTS:

A lot of firms we talk to say they're frustrated by:

- **Confusing or bloated processing rates** that chip away at margins.
- **Delayed deposits** — especially frustrating during tax season.
- **Tech limitations**, like no mobile or contactless options for remote clients.
- Or **poor customer service** when issues come up during crunch time.

Some even mention **difficulty integrating payment solutions** with their accounting or CRM software, which creates extra work for the team.

Does any of that sound familiar?

---

## BENEFITS TAILORED FOR CPA & ACCOUNTING FIRMS:

Here's where we step in:

- We help firms **simplify and reduce processing fees**, often by 20–40%, with **100% transparency** in rate structures.
- We ensure **next-day funding** to help you maintain smoother cash flow and cut down on month-end stress.
- Our platform is built to **integrate seamlessly** with QuickBooks, Xero, and several leading practice management systems.
- We offer **secure, mobile-friendly terminals and invoicing tools** for remote or hybrid client interactions.
- And we back all of that with **U.S.-based, personalized support**, not a call center halfway across the world.

Basically, we help firms like yours look more modern, reduce costs, and keep things running stress-free — especially during peak tax periods.

---

## 3 COMMON OBJECTIONS + REBUTTALS:

### 1. “We’re already locked into a contract.”

Totally understandable. Many firms are — but in some cases, we can run a cost-benefit analysis and show you how we could offset early termination costs through long-term savings. It’s definitely worth looking into.

### 2. “Switching sounds like a hassle.”

That’s what most folks think — until we walk them through it. Our onboarding team handles the setup, device install (if needed), and software integration. Zero downtime, and we train your staff so they feel confident on day one.

### 3. “We’re happy with our current provider.”

I get that. But just like you review a client’s finances annually, it’s healthy to audit your processor too. If nothing else, we can give you a second opinion — sometimes it confirms you’re in great shape, and other times we uncover savings that were hiding in plain sight.

---

## CTA (No-Pressure Close):

I'd love to offer you a **free, no-obligation analysis**. We'll do the homework and show you — apples to apples — how we stack up against your current provider.

What's a good time for a quick 15-minute call this week? I can walk you through it, and if there's no fit, no hard feelings — but if we *can* save you money and headaches, it's usually a pretty easy decision.

---

## CUSTOMIZATION SUGGESTIONS:

💡 If the rep knows a specific detail (e.g. “I saw you just expanded to a second office” or “Tax season must've been crazy this year”), they should weave that in early:

*“I noticed you’ve got great reviews and may be growing — we work with a few expanding firms and know how tricky it can be to keep payment systems aligned with client growth.”*

📊 Reference industry context:

*“A lot of firms are looking to cut back on operational inefficiencies after a tough Q1, especially in light of recent rate hikes across the board.”*

📍 Localize when possible:

*“We’re actually helping a few other accounting pros in [City/County], and they were seeing similar issues with [Provider].”*