

A background image showing a group of business professionals in a meeting. They are gathered around a table, looking at documents and a laptop. The image is slightly faded and has a warm, yellowish tint. On the right side, there are two large, overlapping circles in shades of blue and purple.

BD SCENARIOS

Tips, Tactics & Takeaways

2025

Your global tax partner

"THE UNEXPECTED CONFERENCE CONNECTION"

1

You meet a potential client during a break at a conference. They mention a challenge their company is facing that may fall within your expertise.

What do you say? How do you follow up meaningfully afterward?

- ❖ Use the **5-Question Rule** to actively listen and clarify their real need.
- ❖ **Share specific ideas** and suggest continuing the discussion in a focused setting.
- ❖ Demonstrate expertise with a **relevant client example** or background.
 - *E.g., "We helped a renewable energy client manage permanent establishment risks abroad."*
- ❖ **Mention related topics** that may also impact their business.
- ❖ **Exchange contacts** and propose a **follow-up call** or meeting.
- ❖ Follow up the same day with a personalized **LinkedIn message**.
- ❖ Send a **relevant article** or resource to add immediate value.
 - *E.g., a Taxand article on cross-border structuring.*
- ❖ Maintain **periodic touchpoints** (industry news, insights, events).
- ❖ Be ready with a **30-second elevator pitch** on your expertise and recent cases.
 - *E.g., "I advise multinationals on indirect tax structuring in tech and pharma."*

"LOST IN TRANSLATION"

- ❖ Avoid jargon: **Use plain terms.**
 - *E.g., Say "pricing based on market comparisons" instead of "interquartile benchmarking."*
- ❖ **Give context:** Focus on risks and solutions, not technical details.
- ❖ **Use visuals:** Charts and diagrams help explain complex ideas quickly.
- ❖ **Tailor language** to the client's sector:
 - *E.g., A logistics client might relate better to "international dispatch" than "intra-community supply."*
- ❖ **Encourage interaction:** Ask questions and invite input.
- ❖ Use **analogies** and examples:
 - *E.g., "VAT is like a relay race—each party passes the baton (the tax). We ensure no one drops it."*
- ❖ Include a **glossary** in follow-up memos for key terms.
- ❖ **Rehearse** simplifying technical terms before client calls.

2

You are asked to join a pitch call with an international client. You are the technical expert, but the client is clearly not familiar with tax jargon.

How do you adapt your language and bring value without overwhelming them?

"SILENT CLIENT"

3

You had a promising call with a prospect, but they have not followed up despite your initial email.

What do you do next? How do you balance being persistent without seeming pushy?

- ❖ **Follow up in 7–15 days**, adjusting for cultural norms.
 - *E.g., "Following up on our April 3rd discussion—I had another idea about your LATAM structuring challenge."*
- ❖ **Be concise, respectful, and helpful**—acknowledge they may be busy.
- ❖ **Share a new insight** or idea related to their concern.
- ❖ **Suggest a call** or meeting to discuss updates.
- ❖ Avoid generic reminders—**reference your last exchange**.
- ❖ If needed, **use a firmer tone** for urgent issues or established clients.
- ❖ **Call directly** if appropriate to reconnect.
- ❖ Use a **reminder system** to track follow-ups discreetly.
- ❖ Consider a **LinkedIn nudge** or calendar invite if email goes unanswered.

“FROM TECHNICAL TO TRUSTED”

- ❖ Use your **knowledge of their business** to raise relevant updates.
 - *E.g., “Digital services tax changes may affect your pricing—shall we discuss?”*
- ❖ Mention **Taxand's broader capabilities** across jurisdictions.
- ❖ **Check with colleagues** in other countries for cross-border opportunities.
- ❖ Ask if they are aware of **new laws or risks** you could support.
- ❖ Request a **post-project meeting** to explore further needs.
- ❖ Build a **personal relationship** to understand evolving priorities.
- ❖ **Introduce colleagues** to cross-sell seamlessly.
 - *E.g., “My UK colleague advises on restructuring for PE-backed firms.”*
- ❖ Keep a **library of recurring** issues to flag in wrap-ups.
- ❖ Prepare **talking points** to shift from delivery to advisory.

4

You are already working with a client on a technical issue. You believe there is an opportunity to offer broader support or services.

How do you pivot the conversation from delivery to business development?

"CROSS-BORDER OPPORTUNITY"

5

A Taxand colleague from another country refers a client to you. The client does not know you yet.

How do you build trust and credibility quickly to secure the engagement?

- ❖ **Be responsive and proactive** in your first message.
 - *E.g., "Thank you for the introduction. I reviewed the matter and have a few thoughts we could discuss."*
- ❖ Introduce yourself, your firm, and **share an initial view**.
- ❖ Quickly **schedule a video call** to build rapport.
- ❖ **Thank the referring colleague** and keep them informed.
- ❖ **Get context from the colleague** before contacting the client.
 - *E.g., Ask: "Any preferences on pricing or reporting?"*
- ❖ Share a **tailored proposal** with clear scope and pricing.
- ❖ **Send sector-relevant case studies**, bios, or articles.
- ❖ Invite the client to **Taxand events or webinars**.
- ❖ Ask the **referring firm to introduce you directly**, if suitable.

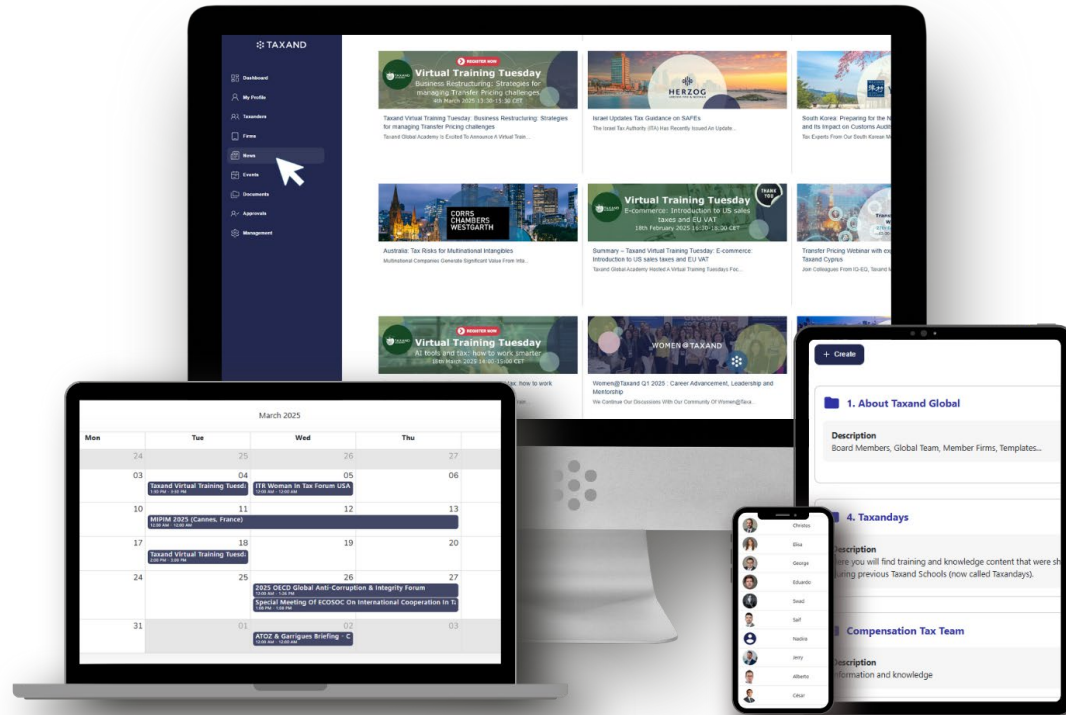
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