

5 Prompts to Sell Like You Actually Know What You're Doing

Stop winging your sales conversations. Start walking in prepared.

Overview

Most accountants treat sales as something they're bad at, a skill they never trained for. The default is winging it: two hours of manual prospect research, guessing at an objection response in the moment, sending a generic follow-up because there was no time to write a good one.

RCRQ (Role, Context, Request, Question) fixes this by turning AI into a sales prep partner instead of a content generator. The five prompts below cover the five moments in a sales cycle where accountants lose the most time or the most engagements: research, objections, follow-up, referrals, and pricing.

Why This Matters

Every hour spent manually researching a prospect or agonizing over how to phrase an objection response is an hour not spent serving clients or closing the next engagement. Worse, generic follow-ups and scripted objection handling read as exactly that, generic and scripted, and prospects can tell.

The firms winning new engagements right now aren't necessarily the ones with the best service. They're the ones who show up prepared and specific, every time. These five prompts close that gap without adding a single hour to your week.

How It Works

RCRQ has four layers:

- **Role:** who the AI should act as (a coach, a strategist, an assistant)
- **Context:** the real situation, pasted in, not summarized
- **Request:** the specific output you need
- **Question:** a follow-up that forces the tool to think with you, not just for you

The Question line is what separates RCRQ from a normal prompt. It's the difference between a generic first draft and something that actually holds up when a real prospect responds.

Your RCRQ Sales Prompts

Note

Copy each prompt exactly as written into ChatGPT, Claude, or whatever tool you're using. Replace anything in [BRACKETS] with your real details before running it.

1. Prospect Research

Role: You are a sales research assistant for an accounting firm.

Context: I'm about to have a call with a prospect. Here is their website content / LinkedIn / description: [PASTE HERE]

Request: Identify their likely pain points around bookkeeping, compliance, or financial visibility. Then draft 3 smart questions I can ask on the call, and one personal hook I can use to open the conversation.

Question: What's the one pain point you'd lead with first, and why?

2. Objection Handling Prep

Role: You are a sales coach for accounting and bookkeeping services.

Context: A prospect said: [PASTE THEIR OBJECTION, e.g. "we already have a bookkeeper" or "this seems expensive"]

Request: Give me 3 different ways to respond that don't sound defensive or scripted. Show the reasoning behind each approach.

Question: Which of these fits a prospect who seems price-sensitive versus one who seems skeptical of switching providers?

3. Follow-Up Email After a Call

Role: You are a sales assistant who writes concise, non-salesy follow-up emails.

Context: I just had a call with a prospect. Here's what we discussed: [PASTE ROUGH NOTES]

Request: Draft a follow-up email that recaps their specific pain points, references what we discussed, and proposes a clear next step.

Question: Is there anything in my notes that sounds like a commitment I made, that I should make sure to honor in this email?

4. Turning a Referral Into a Warm Outreach

Role: You are a sales assistant specializing in warm, referral-based outreach for professional services.

Context: [NAME] referred me to [PROSPECT NAME] at [COMPANY]. Here's what I know about them: [PASTE ANY DETAILS]

Request: Draft a short outreach message that mentions the referral naturally, states one specific way we could help based on what I know, and asks for 15 minutes.

Question: Does this message sound like it could have been sent to anyone, or does it sound like it was written specifically for them?

5. Pricing Conversation Prep

Role: You are a pricing strategist for accounting firms.

Context: I'm about to quote a prospect. Here's their situation: [COMPANY SIZE, SERVICES NEEDED, ANY BUDGET SIGNALS]

Request: Suggest 2-3 pricing structures I could offer (flat monthly, tiered, project-based), with the tradeoffs of each from both my side and theirs.

Question: If they push back on price, which of these structures gives me the easiest way to hold my ground without just discounting?

Putting It to Work

1. Pick the moment you're in right now: research, objection, follow-up, referral, or pricing (10 seconds)
2. Paste the matching prompt and fill in your specifics (30 seconds)
3. Read the output, then answer the Question line yourself before sending anything (2 minutes)

 **Tip:** The Question line is doing the real work in every one of these prompts. If you only copy the Role, Context, and Request and skip the Question, you'll get a generic draft that sounds like it could've gone to anyone.

 **Warning:** Never send AI-drafted client or prospect communication without reading it yourself first and confirming it reflects what you actually know and mean. This is a prep tool, not an autopilot.

About SmartAccountant.AI



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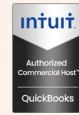
Instead of selling standard software, SmartAccountant.AI equips firms with practical AI training and custom engineering services. It helps firms securely integrate AI into their existing tech stacks, automate repetitive tasks, eliminate manual data entry, and enhance their current accounting software and ERPs with AI-powered workflows.

Jan Haugo is an AI Architect for the accounting profession and the founder of SmartAccountant.ai, a training and build platform focused on helping accounting professionals solve real, day-to-day pain points with practical AI systems.

With more than 20 years of experience running a tech-forward accounting firm, Jan understands firsthand where traditional workflows break down at month-end bottlenecks, manual cleanup, client communication overload, and teams stretched thin by repetitive work. Her work today focuses on designing AI-powered workflows, custom GPTs, and implementation frameworks that help accountants move faster, reduce friction, and elevate their role from task executor to strategic advisor.

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