

FOR FRACTIONAL CFOS

# Fractional CFO: Why Your \$5K Retainer Isn't Selling

*a diagnostic - not another pricing guide.*

How to attract and close premium CFO clients — **without lowering your price, adding more deliverables, or chasing more leads.**

HOW TO USE THIS GUIDE

**This is not another pricing guide.** *it's a diagnostic.*

**YOUR GOAL**

- Identify what's stopping prospects from saying yes
  - Find the hidden friction in your offer, positioning & sales process
  - Fix the real bottleneck before spending on more leads
- you are not looking for new tactics.*

**HOW TO RUN IT**

- Go through each of the 7 sections honestly
  - Tick every box that applies to you
  - Don't change pricing or buy leads yet
- you're looking for the reason your offer isn't converting.*

THE DIAGNOSTIC · 7 REASONS IT ISN'T CLOSING

**1 REASON NO. 01**  
**Your Offer Sounds Like Accounting**

*priced like a bookkeeper, not a leader.*

ASK YOURSELF

- Does your offer focus heavily on reports, bookkeeping, reconciliations, or compliance?
- Do prospects struggle to explain what you actually do?
- Are you selling activities instead of business outcomes?
- Does your website sound similar to accounting firms?
- Do prospects compare you to bookkeepers or controllers?

WHAT THIS USUALLY MEANS

Your market sees you as accounting support — not strategic financial leadership. Businesses pay \$500–\$2,000 for accounting. They pay **\$5,000+** for financial leadership.

**2 REASON NO. 02**  
**You Sell Deliverables, Not Decisions**

*they buy outcomes, not tasks.*

ASK YOURSELF

- Do you lead with reports, meetings, and deliverables?
- Do prospects ask "What exactly do I get?"
- Are your proposals full of tasks and activities?
- Is the value difficult to quantify?
- Do prospects focus on price instead of impact?

WHAT THIS USUALLY MEANS

You're selling what you *do* — not what *changes* because of what you do. Businesses buy **clarity, confidence, visibility, and better decisions**. Not reports.

**3 REASON NO. 03**  
**Your Prospect Doesn't Feel Enough Pain**

*no pain, no urgency.*

ASK YOURSELF

- Are prospects merely curious or "exploring options"?
- Do they admit things are mostly fine?
- Are they delaying decisions repeatedly?
- Are they avoiding financial conversations internally?
- Is there no clear cost to staying where they are?

WHAT THIS USUALLY MEANS

There isn't enough urgency. Strong engagements begin when cashflow is uncertain, growth creates stress, and decisions get expensive. **No pain = no urgency.**

**4 REASON NO. 04**  
**Your Proposal Is Lowering Your Value**

*complexity creates hesitation.*

ASK YOURSELF

- Do you customize every single proposal?
- Do proposals exceed 3–4 pages?
- Do you list every deliverable?
- Do you explain pricing extensively?
- Do deals stall after proposals are sent?

WHAT THIS USUALLY MEANS

The proposal itself is creating friction. Strong proposals **simplify, clarify, and create confidence**. Complex proposals create hesitation.

**5 REASON NO. 05**  
**You're Talking to the Wrong Buyer**

*decision-makers buy faster.*

ASK YOURSELF

- Are you speaking to someone without authority?
- Are multiple people involved after the call?
- Do decisions take weeks?
- Is finance viewed as an expense internally?
- Does leadership lack financial maturity?

WHAT THIS USUALLY MEANS

You're trying to sell strategic leadership to someone who cannot buy it. Strong clients are **founders, operators, CEOs, and owners**. Decision-makers buy faster.

**6 REASON NO. 06**  
**You're Creating Too Much Complexity**

*simple scales.*

ASK YOURSELF

- Do you offer multiple service levels?
- Do prospects seem confused?
- Do you customize every engagement?
- Are there too many options?
- Do conversations drift into details?

WHAT THIS USUALLY MEANS

Confused prospects delay decisions. **Clear offers close faster**. Simple scales — complexity stalls.

**7 REASON NO. 07**  
**You're Solving the Wrong Problem**

*executives buy outcomes.*

ASK YOURSELF

- Are you focused on financial outputs instead of business outcomes?
- Do prospects struggle to connect your work to growth?
- Are you discussing accounting instead of business decisions?
- Does your messaging focus on process instead of results?
- Do clients struggle to explain your value to others?

WHAT THIS USUALLY MEANS

Your positioning is disconnected from executive priorities. Executives buy **visibility, profitability, confidence, growth, and control**. Not finance tasks.

YOUR RESULT · READ THE PATTERN

**Count the boxes you ticked.**

- The sections **most** are where your sales process is with the **checks** breaking down
- Do **not** immediately change your pricing
- Do **not** immediately buy more leads
- Fix the **bottleneck** first — then scale what works

*the leak is rarely where you think it is.*

WHY THIS MATTERS

**Most fractional CFOs don't need more leads.** *they need to fix the bottleneck.*

MOST CFOS ASSUME THEY NEED:

- × More leads
- × More marketing
- × More content
- × More networking

BUT THE REAL ISSUE IS USUALLY:

- Weak positioning
- Low urgency
- Proposal friction
- Buyer mismatch & unclear value

*more leads don't fix conversion. positioning does.*

WANT HELP FIXING THE REAL BOTTLENECK —

*we'll find why your current offer isn't converting.*

## Apply for a Fractional CFO Growth Strategy Session

DESIGNED SPECIFICALLY FOR:

- Fractional CFOs, virtual CFOs & strategic finance consultants
- Accountants transitioning into advisory services
- Advisors ready to close \$5K+ retainers without discounting

**Book a Free Strategy Session →**

We'll identify why your offer isn't converting, where prospects are dropping off, what's reducing perceived value, and what needs to change before you spend another dollar on lead generation.

[square1grp.com/brainstormsession](https://square1grp.com/brainstormsession)