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Top 25 Accountant Marketing Ideas from the Pros 2018

By Anna Dizon on May 3, 2018 | Marketing, Marketing Ideas | Comments (0)

The accounting industry may be undergoing some significant changes. A State of Accounts Report showed that 37% of small- and medium-size businesses think that the service is being automated to such a degree that it's possible they may not need an accountant in 10 years' time. This finding makes it all the more important for CPA firms to innovate and improve their accountant marketing strategies.

We asked the experts to share unique marketing ideas for accounting firms that can help boost their brands and stay relevant. Here are the top 25 accountant marketing ideas from the pros.

1. Offer Free 10-Minute Consultations

Alexandra Bohigian, Marketing Coordinator, Enola Labs Software

CPAs should establish themselves as thought leaders in their industries. You don't have to be working for a huge accounting firm in order to make a name for yourself. When people are searching for a CPA, it is often difficult for the individual to determine if they actually need a CPA and also why they need a CPA. Ten-minute consultations take just a little bit of time and can be an excellent tool for building rapport with potential customers. These consultations will often turn into paying customers, so it can be an extremely cost-effective marketing tool that most CPAs can handle on their own without hiring outside help.

2. Speak at Industry Events

Erica Stritch, VP of Marketing, RAIN Group

One of the best ways to connect with new clients is at industry events. Even better than attending an event is securing a speaking spot. When you're the one on stage, you're automatically considered an expert in your clients' minds. It allows you to stand out against the sea of CPAs and accounting firms. But don't expect to speak and have the phone start ringing with new clients. During your presentation, offer to share a white paper or research your company has produced that digs deeper into the topic. Have a way to collect attendee information and send them this content piece in the days following the event.

Offer to walk their team through it, or discuss how it relates to their business and what you've seen other companies in their industry do that has worked. Finally, have an event follow-up plan in place to keep the conversation going.

3. Identify and Proactively Reach Out to Industry Influencers

Carrie McKeegan, Co-Founder, Greenback Expat Tax Services

The best way to bring in new customers is through word of mouth and those who are already predisposed to trust you. Many marketers think those relationships only happen by chance, but actually outreach is key here. Identify your industry influencers and proactively contact them and offer to write for their blog. Offer to let them try out your service, etc. Make sure it's genuine—I'm not talking about paid advertorials focused as endorsements! You want to show them how great your product or service is so that they naturally recommend you as a believer in your company.

4. Market Your Expertise Beyond Just Books and Taxes

Mike Goossen, CPA, CFO, CEO, Columns 4 Success

Every CPA or bookkeeper has more work than they know what to do with during tax season. To avoid this, I've used my background as a former CFO to market myself as an "Outsourced CFO." This is a service that a business should be using year-round to manage their financial position, not just to prepare taxes. I position myself as an expert in business finance and planning, not just accounting.

5. Show Your Expertise with Podcasts...

Michelle Ngome, Connection Enthusiast, Line 25 Consulting

Small business owners run into CPAs all the time, but have no way to measure their expertise. What better way to demonstrate a firm's expertise than by having a podcast. Podcasting has taken over the digital landscape for the past several years. It has seen 10%-20% in steady growth with 112 million Americans listening to podcasts in 2017. Capturing a fraction of loyal podcast listeners can work wonders for a business. Podcasting is a great centerpiece when it comes to education, lead generation, content and social media marketing.

Looking for inspiration for your own podcast? Check out our list of best small business podcasts and learn what makes them popular and interesting to small business owners.

6. ...or on YouTube

Geoff Hoesch, CEO, Dragonfly Digital Marketing

While I feel a multi-pronged approach is necessary for any marketing campaign in order for it to be successful, a good place to start would be videos describing different tax situations and what they mean to small businesses or individuals in your state and municipality. I recommend creating a YouTube channel for the videos and featuring the videos in blog posts that elaborate on the content in the video. If you live in Alexandria, VA, you could do a video on property tax rates in Alexandria, or the tax benefits of a Virginia529 Invest plan.

You don't need to spend a lot of money to produce the videos; if you use a 4k smartphone for the video, which you or an employee probably already have, you can then buy a good lavaliere mic and a ring light on Amazon for around $150.

7. Create an Advisory Committee Involving Long-Term Clients

Blake Christian, CPA, Partner, HCVT

Consider establishing an Advisory Committee made up of a few long-term clients and trusted business associates who you can use as a sounding board to fine-tune your firm's strategic plan, marketing strategy and potential new service offerings. Make it worth their while by having meetings at nice venues and at convenient times to minimize the committee member's business or family inconvenience.

8. Be Creative with Your Marketing at Networking Events

Sheryl Johnson, Founder, BD-PRo Marketing Solutions

Small CPA/accounting firms typically rely on networking as one way to build relationships and meet new clients. A unique marketing idea is to use personalized stickers to leverage the space on the back of your business cards to showcase a particular service or to attract the attention of a specific target market. The trick is to include a call to action. So for example, you could say "Download your free copy of '8 Ways a CPA Can Save You Money.'" Or, maybe share the three ways your CPA firm is radically different from other firms and offer a complimentary consultation. The advantage of using a sticker is that you can vary your message depending on who you are networking with and test various actions to see what spurs the most interest.

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9. Use Your Current Engagement to Improve Your Marketing Strategy

Chris Jarvis, Author, Speaker and Founder, Jarvis Tower

For smaller firms, the expansion of services is no longer a novelty or a luxury—it is an absolute necessity. When you are gathering information from your clients to prepare their tax returns, you should ask them for their top goals and concerns for the year.

Are they interested in:

- Adding a new owner, partner or investor in 2018?
- Do they want to sell the company in the next three years?
- What are their three biggest financial concerns for this year?
- What is their growth goal?
- Have they updated their estate planning in the last two years?
- Do they understand the opportunities under the new tax bill?

Once you know what your customers want and need, the next step is to respond to them. You want to piggyback on your trusted advisor status and focus on educating your customers. You are not going to turn your tax preparation staff into gifted writers, so don't try. By partnering with a gifted writer in the financial services space, you can offer a weekly newsletter, a monthly webinar and quarterly live events where you connect with your customers.

10. Optimize Your Website for Mobile Users

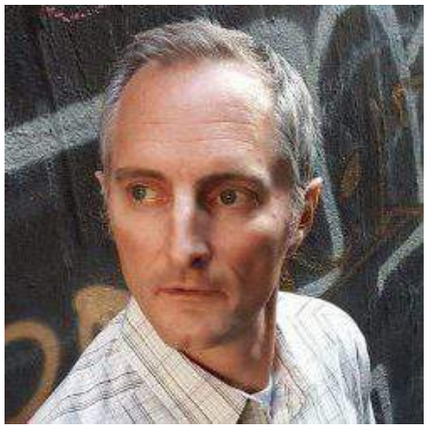
Tabitha Jean Naylor, Owner, TabithaNaylor.com

More than 50% of people now access the internet through a mobile device. Accounting firms must have responsive websites that have all of the same functions on the go as they do when people are at a desktop. Accounting firms must ensure that their landing page includes contact information, the major services they perform, and some kind of call to action such as scheduling a consultation. A clean, actionable website is one of the most powerful attractors for prospects to engage with a business, and accounting is no different.

11. Co-Sponsor Local Events with Good Clients

David Gosselin, Partner, DBBMcKennon, CPA

One of the most effective marketing techniques can be sponsoring events that a good client also sponsors. For small CPA firms, brand name recognition is non-existent, so don't assume people know who you are. Small CPA firms typically rely on word of mouth advertising and referrals. So ask your clients what and when they are sponsoring events and try to get a booth near them. When someone they speak with asks who they use, how they do it, etc., they can just point to your booth and say, "That is my go-to CPA firm." That is instant credibility.



12. Use LinkedIn for Business-to-Business Marketing

Kent Lewis, President and Founder, Anvil

LinkedIn the least tapped in terms of leveraging influencers. With over 13,000 connections myself, I've become a bit of an expert on the platform and see this as a big opportunity for 2018 and beyond. Secondly, the platform is ideal for business-to-business marketing. There is no other platform that can target prospective customers with ads based on employer, job title, location and other key factors. Lastly, the platform is ideal for generating awareness and credentials via thought leadership (posting updates and writing articles on LinkedIn Pulse). I've written extensively on digital marketing and LinkedIn specifically.

Want to know more about LinkedIn marketing? Check out this Fit Small Business guide to setting up your own LinkedIn profile and start connecting with other businesses to attract more leads today.

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13. Bring Your Website into 2018

Samantha Russell, Director of Sales and Marketing, Twenty Over Ten

Having a website is a no-brainer for today's small businesses. It's time to ditch your brochure website, that is so 2000. In order for your website to be a successful component of your business and digital marketing strategy, you need to step up your game. It's true—clients and prospects won't be satisfied with just another repetitive CPA website. Aside from ensuring that your website is responsive, scalable, UX-friendly and can prove ROI, you also need to invest in optimizing content.

As SEO continues to evolve and Google rolls out even more algorithmic updates, achieving top listings with local search results means transforming how you create content, optimize your site and track performance. As a small accounting firm, a strong local SEO strategy will be key to generating new business.

14. Host Financial Planning Seminars

Jacob Dayan, CEO and Co-Founder, Community Tax

If you're finding it difficult to acquire new clients outside of tax season, consider hosting a seminar or even a series of classes that teach potential clients tips and tricks on handling their money. Ultimately, the goal of the seminar is to gain new clients, so while the seminar may focus on how attendees can better manage their money, make sure to also incorporate how you can help them. Offer them enough tips that they can benefit from attending the seminar, but not so many that they don't need your services at all.

For example, focus on budgeting and general financial planning, and then let them know all the benefits they can get from choosing you to handle their taxes, which is much more complicated. While this is a much more involved way to market your business, it will likely yield some great leads.

15. Partner with a Financial Advisor

Dan Timotic, CFA, Managing Principal, T2 Asset Management, LLC

CPAs are among the most trusted advisors. One area where CPAs have not penetrated well is wealth management. Why? Most financial advisors are simply salespeople looking to sell something to a client, and that could negatively impact the relationship between the CPA and their client. If a CPA finds the right advisor, they can add significant value to their clients, and in turn, their clients will refer more people. As a fiduciary, it is my responsibility to do what's in the best interest of my client.

When partnered with the right advisor, the CPA can provide a more comprehensive service to their client and even increase their engagement with that client by creating greater dependence as well as increasing revenue. One important thing to consider when partnering with an advisor is how they will communicate their ideas and strategies to both the CPA and the client.

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16. Request Testimonials from Your Satisfied Clients

Carmine Mastropierro, Owner, Mastrodigital

Small accounting firms should focus testimonials to acquire new clients. This strategy is proven to increase conversion rates and trust. Ask customers to leave a genuine review on your service and compile them for future visitors to read. This social proof aids in converting leads because they can see other businesses have experienced positive results.

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17. Choose the Right Platform to Promote Your Business Online

Linda Pophal, Consultant and Owner, Strategic Communications, LLC

When seeking services like accounting services, we want to connect with people—not companies—so make it more about them than about you. Marketing of your business can best be done through thought leadership that is accomplished via content marketing. Establish a strong presence online in places where your target audience is likely to be, and likely to be looking for, the information you have to provide. For instance, if focusing on accounting for individuals/families, this might be Facebook. If focusing on accounting for business, this would more likely be LinkedIn.

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18. Set Up an Online Learning Platform

John Kogan, Co-Founder and CEO, Illumeo, Inc.

Many CPAs, from individuals to large firms, should consider creating live webinars and on-demand online courses on a host of topical accounting and tax issues with an online learning platform like ours to help establish their brand. Our community includes tens of thousands of corporate finance, accounting and tax users who are the ideal "prospect" target for CPA firms. When one of our users attends a webinar, or takes a course where the CPA and/or their firm's brand and contact information is on the materials and mentioned during the presentation, it provides both brand exposure and, at times, direct lead generation for them.

Look for a platform that's free for your firm to participate in to keep the cost of using this strategy to a minimum.

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19. Always Include a Headshot with Your Testimonials

Rally Stanoeva, Head of Marketing, Rewind

Hopefully, you are already asking every single one of your clients for a testimonial. But make sure you are also asking them for a photo that you can include alongside their testimonial. It doesn't have to be a professional headshot—in fact, a more "real" photo helps to add validity to your testimonials. And don't bury testimonials on a secondary page of your website. The photos and quotes need to be front and center on your homepage.

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20. Nurture Your Other Trusted Advisors

Jennifer Garcia, Partner and Head of Account Management, Red Bamboo Marketing

How often do you ask someone that you trust for a recommendation? Just think how many times you were asked to recommend another professional—whether it is a lawyer, an insurance agent or even a mechanic. Most small- and medium-size businesses rely on referrals from their trusted advisors. So it is important for professional services companies like accountants to take care of companies that also provide professional services to your target audience, e.g., lawyers, insurance companies, and other outsource services like HR and IT. Develop a nurture campaign to other trusted advisors—get to know them and then they will recommend your services to their clients, and vice versa.

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21. Amortize Your Cost of Trade Shows and Travel by Meeting Prospects and Referral Sources

Marcia R. Golden, Managing Partner, DJD Golden

The backstory: a CPA client at a small firm told me he would walk various trade shows in industries relevant to his practice, stop at exhibitor booths and try to get someone to speak with him about accounting. When we asked him how that worked for him, his response was, "Not so well...," which begged the question, wouldn't you want to know in advance you had meetings set up with exhibitors ahead of schedule so that you wouldn't have to "ambush" people in their booth when they are trying to connect to attendees (and not you!)? Unsurprisingly, he said, "Yes!"

What we did: he planned to attend ABC Kids Show in Las Vegas, so we developed a database of email contacts of prospects from the published exhibitor list, with a focus on companies in the Metro-NY/tri-state area. Then, we created an email noting the CPA was attending the show and did the prospect have time to meet for 15 minutes at their booth or for breakfast/lunch/coffee/drinks, or, if they weren't planning on attending the show, would they like to set up a time to chat at their convenience. Finally, we sent out 120 emails, and secured seven meetings for the CPA at the conference and one meeting with a local prospect prior to the show, which resulted in a $30,000 engagement.

All of this was without a single phone call. Just a well-written, approachable request-for-meeting email.

22. Segment Your Marketing Campaign Based on Your Clients' Lifestyles

Samuella Becker, CEO and Founder, TigressPR

Tax advice is needed year-long for individuals, especially those of high net worth and entrepreneurs. So don't just assume that your marketing campaign should be held at "tax time" to bring in more customers. Rather than think of individuals collectively, break down your marketing initiatives by lifestyle or life-changing events. For example, marriage brings about the union of two people who are in love and will be financially bound together, even if both maintain their separate bank accounts. So perhaps you want to "team up" with other businesses marketing to the newly engaged, be it wedding planners, bakers, florists, travel agents (honeymoon), and more, to host a day-long seminar for brides and grooms to be. CPAs may even want to weigh in as far as wedding expenses/advice.

23. Hire a Professional to Write Your Content

Aside from taking too much of your time from what is already a very time-sensitive profession, writing is simply not the best use of an accountant's skills. You'll also find that writing is a task that will need more than your technical knowledge, so unless you've always been an avid writer, it will be much easier to hire a professional for the job. This article lists the number of reasons why an accountant should let a professional write their marketing content instead of doing it themselves.

24. Follow a Step-By-Step Marketing Plan

Small accounting firms will not always have a large budget to dedicate to their marketing plan, so it's important to be strategic and know what to prioritize and how to work on a budget. By focusing on developing the brand, increasing visibility and improving customer engagement, small accounting firm owners can develop a strategy to maximize their resources. This step-by-step guide on how to market an accounting firm will help you better market your business today.

25. Know How to Identify and Correct Common Marketing Mistakes for Accounting Firms

You must have already heard of marketing stories that didn't end well, and they are surprisingly easy to fall into if we don't keep a watchful eye out for the signs. Know how to spot marketing mistakes common to accounting firms and find out how to correct them with this article. By doing so, you avoid the risk of spending more time and money than you originally planned.

Over to You

The effects of a great accountant marketing strategy for CPA firms extend beyond collecting more leads that may or may not become a client. Instead, a great marketing strategy helps build long-term connections between your firm and other individuals as well as businesses that can help sustain your business even as the demand in the market changes.

Did we miss out on your favorite accountant marketing idea? Let us know all about it in the comments!

About the Author

Anna Dizon

Anna Lynn Dizon specializes in writing tip lists and other content for Fit Small Business. She is a business and finance major who previously worked for a US risk mitigation company in its regional office in Singapore. Anna started her writing career as a research and writing assistant for eBooks on various niches. She spends her free time giving English tutorial lessons. She is also currently working on her Master's Degree in Language and Literacy Education.

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