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Kristy Short • Aug. 29, 2012



Nobody likes another list of “to do’s.” With all that’s going on in the profession, we all have enough, well, *to do*. If it makes a difference, the list presented in this month’s *Marketing In Practice* is a *must* do and was developed as a step-by-step guide to create a successful marketing program. Hopefully, that does make a difference, because this column is packed with great tips to help you plan your marketing for positive results.

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Marketing is a “slow grower.” It takes time, attention, and lots of tweaking over several months before you get to a place where you feel your marketing groove. Marketing should be taken in small, guided steps.

The following 7 Must Do's were designed to offer a roadmap for firms just starting out with marketing efforts. Hit each item on the list and you will be well on your way to establishing a solid marketing program for your firm. With that said, throw on your most comfortable shoes because we are hittin' the ground runnin'.

**1. Determine Your Vision**—Can you clearly articulate your firm's vision? If you can't, then you are not ready to begin marketing. Marketing is all about telling your story and relaying a defined message to your target audience. What story is there to tell if you haven't defined who you are and what you offer? These are two key elements of your firm's vision.

“There are many factors that firms have to consider: what services they offer, do they operate in the Cloud, and are they targeting certain niches,” explained Katrulya. “Once you have a clear vision for your firm, then you can begin to craft your marketing initiatives. If you don't know who you are, you can't articulate it properly, and that means you can't expect prospects to understand what you are all about either.”

**2. Plan Your Strategy**—Before you invest in marketing, do some thoughtful planning to ensure a reasonable return. The quickest way to get frustrated is to spend a lot of time and money on an elaborate campaign that offers very little ROI. Ask yourself, “What are the specific results I want to achieve from my marketing efforts?” Katrulya explained further. “For example, if you're trying to land clients for a one-time training engagement, you'll want to plan an economically sound marketing initiative. Save the bigger events, like an open house or advanced print campaigns, for leads that promise ongoing, higher-rate revenue.”

### 3. Name a Marketing Champion—Don't expect your marketing program to be

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administrative employee, your champion should have the bandwidth to follow through with marketing efforts all year," explained Katrulya.

4. **Build Out Your Marketing Materials**—When you are ready to market your services, you will need professional marketing collateral to support your efforts. Be prepared; build your arsenal early. Katrulya recommends developing a comprehensive marketing kit. "Firms need to go beyond a basic kit that usually contains a business card, letter, and maybe a brochure. A ready-to-go expanded kit is far more effective. A professional kit should include client case studies, client letters of reference, and niche-specific materials along with the basic items."

Firms can outsource this task to ensure marketing materials that are professional, consistent with their brand, and written in the voice of the firm with the proper messaging. There are creative firms out there with both marketing and accounting niche expertise. And don't forget that your website and social media sites are also part of your arsenal.

5. **Get Your CRM On**—A sound marketing program requires a mechanism for tracking and following up with leads. The sales cycle can last months, so using a CRM (Client Relationship Management) system to help monitor and follow leads through the sales funnel is critical.
- "Firms fail to turn leads into clients because they don't have the proper tickler system in place. A prospect may indicate that she is not ready to move forward, but is open to being contacted in a few months. With no way of monitoring lead activity, the prospect is often forgotten. A good CRM tool will fix this problem. The key is finding one that is not only a good fit for your firm, but a system that you will use every day," stated Katrulya.

6. **Start a Marketing Calendar**—The best way to get a marketing program off the ground is to record planned events on a calendar—complete with dates, collateral needs, target audience, campaign type, and other relevant information. Again, you

don't have to create a full-year calendar, just write down a few initiatives to start.

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**1. Make Time to Evaluate**—No plan is full-proof, so be sure to take the time to evaluate your marketing program and revise it on a regular basis. Katrulya advises that firms should pick a month to review and retool. “You have to stop and analyze your marketing initiatives during the year to identify what’s working and what isn’t. By looking at what you’ve already done, you can better plan what you need to do.”

To evaluate your program, review such items as click-thru rates, website hits, printed or online contact forms received, and leads to client transitions. Don’t assume that just because you are sending out large volumes of campaigns and/or have your brand appearing in multiple channels (e.g., print ads, social media) that your marketing program is successful. Katrulya warned, “There is a big difference between being visible and being successful.”

Marketing is a long-term commitment that pays off if done correctly. Upfront planning, like defining your vision and core marketing strategies, are essential. Also integral to a sound marketing program is electing a champion, creating a marketing calendar, and taking the time to evaluate and tweak your program. If you follow a few basic steps, marketing doesn’t have to be overwhelming or scary. So, lose the fear and jump in. After you’ve tackled a few marketing campaigns, you’ll wonder what all the fuss was about.

### About the Author

Kristy Short, Ed.D, is partner and chief marketing officer at RootWorks ([RootWorks.com](https://www.rootworks.com)) and president of rwc360 ([rwc360.com](https://www.rwc360.com))—firms dedicated to providing practice management education, branding, marketing, and public relations services to the accounting profession. She is also a professor of English and marketing. Reach her at [kristy.short@cpapracticeadvisor.com](mailto:kristy.short@cpapracticeadvisor.com).

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