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FIRM MANAGEMENT

5 Tips and Tools for Accounting Firm Email Marketing

One of the most chronic complaints of clients that leave their CPA to find another is their former CPA's lack of communication. So if there is a tool that can both help you communicate more in a leveraged, time-saving way while also warming up ...

Sandi Smith Leyva • Jul. 25, 2016



One of the most chronic complaints of clients that leave their CPA to find another is their former CPA's lack of communication. So if there is a tool that can both help you communicate more in a leveraged, time-saving way while also warming up prospects and shortening your sales cycle, would you use it?

The sad truth is that this tool, email marketing combined with client newsletters, is vastly underutilized in accounting. Ah, but that adds another benefit: competitive advantage.

It's really quite easy to implement. All you need are three things:

- A list management tool
- Your client list with emails and preferably permission
- Content for your newsletters and marketing emails

List Management Tools

If you have a CRM with robust email marketing capabilities, then you already have your list management tool. Some of the market leaders in the enterprise space include:

- SalesForce
- HubSpot
- Eloqua
- Marketo

In the small and solo firm space, any of these vendors are more affordable and a few of them are free:

- Constant Contact
- GetResponse
- Aweber
- Vertical Response
- MailChimp
- iContact
- Campaigner

When you choose a vendor, be sure to choose based on email deliverability rates in addition to feature set and price.

Your Client List

Some firms will need to do some admin time to put together their client list, especially if they don't have a CRM or have not collected emails. If you don't already have a process to add new clients and prospects to your list management tool, it's essential to put that process in place.

Content

Developing content is the most time-consuming part of delivering a newsletter, but it doesn't have to be. There are many vendors in the accounting space where you can outsource content development. Here are just a few:

- ThomsonReuters
- Mostad
- ClientWhys
- CPASiteSolutions (comes with website)
- AcceleratorNewsletters (author's company)

The best combination I've seen is to hire a professional marketing copywriter, allow them to interview your technical people, and have the writer develop the content for you with a tech check by your CPAs. Often there will be at least one CPA in a firm who loves writing. Tap them to be the source of your articles.

Five Tips

The upsides are huge to producing a newsletter. Here are five tips to get the highest ROI from your efforts.

1. Be consistent.

An easy way to be consistent is to write all your articles at once and schedule them ahead of time. A few months before you run out, write another batch to be scheduled. What doesn't work is to start and stop a newsletters; your list will unsubscribe and your lack of communication will be exacerbated.

2. Solve business problems, not accounting ones.

Business hire you to solve their accounting problems, so your newsletter content should focus on business, not accounting. Topics such as business strategy, pricing, planning, human resources tips, time management, and marketing will go much farther than tax laws. Focusing on business topics with a soft mention of the financial aspect will increase your "open rate" by 30 percent compared to if you stick to straight accounting mumbo-jumbo.

3. Produce seasonal updates with soft upsells.

I love it when my lawn maintenance company tells me it's time for leaf collection, fertilizer, or scalping. They do so in a newsletter. You can let your clients know the best time to switch payroll systems, when they need to review their quarterly sales tax, and when you'll be doing their adjusting entries, all via a newsletter.

4. Stop procrastinating.

Each year you wait to implement your newsletter, you lose out on building your list, upsell revenue, and new sales. I start my list in 2005, but I still berate myself that I didn't know to start in 2001. It's never too late to start, and the sooner the better.

5. Don't forget to pitch.

Most firms are so focused on getting the newsletter out they forget the email marketing piece. Once someone is on your list, they are giving you permission to pitch. Use it. Send both direct email “special announcements” to pitch a new service but also write in a soft upsell in every article. For example, the article “Five Tips to Select a Payroll System” can include a sentence that says, “If we can help, let us know.”

Taking Action

Competitive advantage. Increased revenue per client. Better communications. Opportunity to market. Shorter sales cycle. Warmer prospects. More informed clients. What’s not to like about email marketing?

Sandi Smith Leyva, CPA, CMA, MBA, and founder of [Accountant’s Accelerator](#), has helped thousands of accountants earn more, work less, and serve their clients better through her innovative coaching and training services.

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