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firms often struggle. Many cite bringing in new clients as the top challenge to growing their business. Referrals and word-of-mouth have long been popular marketing ...

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Marketing is a crucial part of building any business, but one with which accounting

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CPA.com recently sat down with some top marketing professionals to get their expert advice on how to build a successful marketing program. The panel included:

- [Pauline Gonnering](#), Director of Growth and Operations at Cummings, Keegan & Co. P.L.L.P.
- [Joe Kovacs](#), Director of Marketing & Business Development and Councilor at Buchanan & Mitchell, P.C.
- [Jane Willis](#), VP of Marketing, Accounting Channel at Bill.com
- [Sheila Geiman](#), Channel Marketing Manager at Sage Intacct

Their insights are shared in a two-part series ([part 2](#)) – one focused on getting started and the next on execution. We began by talking with our panel about business objectives, setting expectations and defining success.

Building Your Firm's Marketing Program

How do you begin with marketing? As with all things, it helps to start with a plan.

A successful marketing plan hinges on three essential components, according to Joe Kovacs. “First, identify your goals. Then, move them further along in the direction of revenue-generating opportunities. Finally, gauge your success rate. Begin with basic tactics. Start a newsletter, do a meet and greet and then follow up with higher-level objectives such as how many referrals and leads you're getting,” he advised.

“Firms that structure yearlong plans and execution deadlines around internal and external referral programs and campaigns see a significant increase in the quality of leads and higher lead-to-sales conversion rates,” observed Sheila Geiman.

Pauline Gonnering stressed the importance of selecting initiatives that align with your firm's strategic goals in order to focus your resources for the year: “Defining

plans, with strategies and targets, for our initiatives helps us implement them in a

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business to later focusing on growing revenue.”

Budgets and Resources

All the marketing experts acknowledged that there's no one-size-fits-all answer for budgeting and getting started.

Jane Willis offered some solid starting points that include being realistic about money and resources. “Determine how much money and time you can invest,” she counseled. “Don't underestimate how long things will take. Start with a website and get clear on what your messaging, customer and focus are. The site doesn't have to be fancy. But make sure you are focused on the target customer with your messages. Establish your brand across all the social platforms, then pick one or two platforms to focus on. Listen to what customers, prospects and partners are saying online.”

Willis and Kovacs also emphasized that, if your budget allows, you might want to consider hiring a marketing professional who will drive the program and ensure that you're continuing to reach your clients and potential clients – even when your staff is focused on high-value billable work. The right marketing professional will offer strong leadership skills and take the initiative, proactively communicating ideas and strategies rather than waiting to be told what to do.

Marketing and Sales – A Strategic Partnership

Successful marketing doesn't occur in a vacuum. Instead, it functions best as a collaborative effort with your sales strategy and team. How does marketing intersect with a firm's sales efforts?

It often depends on the accounting firm.

Gonnering explained that, at her firm, “Our partners, managers and all firm

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Kovacs explained that his firm embraces the role of leaders as salespeople and works to enable their sales efforts.

“The practice leaders need to be prepared, trained and equipped to handle new sales opportunities,” commented Kovacs. “At the same time, we focus on the next generation of leaders and salespeople, giving them opportunities to learn by taking them to prospect meetings and investing in new leadership training. Giving them quantifiable goals makes it less challenging for them.”

Willis identified key ways that marketing departments can enable firm partners to sell the firm and its services, including creating sales decks and sales training, preparing checklists on how to recognize prospects and having a good website that provides credibility and a clear lead follow-up process.

Geiman offered a similar approach, explaining: “Marketing can empower firm partners with education and prebuilt communication resources, so they feel confident in talking about the company and specific services. The partner has to understand the value the service brings to the firm and why it is a priority.”

Bonus Points: Understand Why Clients Become Clients

You landed a great new client. But can you answer why? Examining why prospects become clients and the milestones of their journey can amplify your marketing efforts.

“Don’t underestimate the usefulness of marketing throughout the buyer journey, from initial awareness to lead generation and the nurturing of new prospects to the closing of new business,” advised Willis. “You need to know who is aware of your firm and what perception they have of you. The idea is to help establish a reputation that encourages people to do business with you. For service firms, it is important to demonstrate credibility and to showcase your expertise.”

Implementing a feedback system where customers can provide input gives you a

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strategies and insights from our experts, check out the [5 Key Principles of Successful Accounting Firm Marketing](#), presented by CPA.com in collaboration with the Association for Accounting Marketing, [Bill.com](#) and [Sage Intacct](#).

Don't miss [part two in this series of Marketing Advice from the Experts](#), "**Beyond Planning: Successful Execution.**"

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Michael Cerami joined CPA.com at the company's inception in January 2001 as Vice President, Strategic Alliances. Since then, he has been a key contributor to the company's growth through the development and execution of a market-leading alliances strategy. Michael fosters a partnership philosophy at CPA.com that emphasizes business strategy alignment, creating mutual long-term value and a commitment to empowering the accounting profession for success in the digital age.

In addition to his Alliances responsibilities, Michael oversees the marketing, business development and communications functions at CPA.com. He works closely with key influencers across the profession, including firm associations, state CPA societies and the thought leader community. Michael is connecting regularly with firms of all sizes to discuss their strategies for leveraging technology to improve client service and achieve growth.

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