

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

excellent service, and maybe your marketing strategy (even if that strategy is referrals) has your client pipeline near capacity.

**Katie Thomas • Dec. 17, 2021**



Money is the cornerstone of your business, right? You work hard, offer your clients an excellent service, and maybe your marketing strategy (even if that strategy is referrals) has your client pipeline near capacity. However, if you're not using an automated marketing system that works in the background alongside your active strategy, you're losing money.

Statistically, **75%** of companies are using marketing automation. If your firm isn't already, here are four key reasons to start using marketing automation.

## 4 Ways Marketing Automation Can Supercharge Your Firm

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

- Social Media
- Etc.

Traditionally (and this is something we do a lot), we capture leads through forms. Perhaps the person contacts your firm for more information or wants to download an ebook you created as a content asset.

When the person enters their information into a form, all of it will be added to one central location so that your marketing team can nurture the lead further. The great thing about forms is that you can collect email addresses to add the person to your automated email sequence or collect their phone number and give them a call immediately if they're deeper into the buyer's cycle.

Social media alone has **4.48 billion** users that you can leverage to grow your business. However, when you use automated marketing to capture these leads or their information, it promotes your business without the intense resources required in traditional marketing.

## 2. Nurture Leads Hands-off

You've captured a lead's information, but now you need to nurture the lead. Roughly **80%** of leads don't turn into sales, and a major reason for the sale being lost is that you're not spending time educating or building a relationship with them properly.

It's crucial that you help the lead move to the next stage in the buying cycle. Through automation, especially email, you can nurture a lead in so many ways. A few of these ways include:

- Sending content to educate them
- Asking them to book a discovery call

For example, a person may want to know about new tax changes, so they sign up for

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Marketing teams spend a lot of time focusing on conversion rates. Adding all of the lead's information to a central database and capturing the right data can support conversions.

For example, you can use automation to determine:

- Where leads are in the sales process to create content or content assets to help nurture and convert these leads further.
- Who didn't end up showing up for discovery calls? These individuals are very interested in your firm, but something led to them missing the call. You can run an automated campaign to rebook the person for their missed call automatically.
- If you've sent out proposals, it's highly likely that some of them haven't been followed up on. Using automated marketing, you can have follow-ups go out automatically. These automated touchpoints ensure that you're always nurturing leads and no one goes overlooked.
- Additionally, you can add data into your system to reach out to leads that said, "Maybe I'll need your services in the future."

Salesforce reports that it takes **6 to 8** touches to convert a sales lead, and adding automation to your marketing will help you make all of these touches without resulting in a lot of additional effort on your part.

## 4. Retain More Clients

Businesses spend a lot of money trying to get new clients, but it's much cheaper to retain clients. Also, increasing the customer lifetime value of clients allows you to profit more from the relationships you've already built.

However, as your firm grows, it can be increasingly difficult to maintain regular touchpoints with clients. Automation can help.

Through automation, you can:

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

## Final Thoughts on Automating Your Firm's Marketing Strategy

Marketing doesn't just include automation. You need to have a well-planned marketing strategy that can help you attain your growth goals while *also* using automation to augment what you're already doing.

If you add proper automation into your marketing strategy today, you'll improve lead conversions and client retention, while decreasing the burden on your marketing team.

=====

Katie Thomas, CPA is the owner of [Leaders Online](#), where they help professionals in the accounting industry increase their impact, influence, and income through thought leadership marketing. If you need help with your marketing system, feel free to reach out to her.

Firm Management

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved