

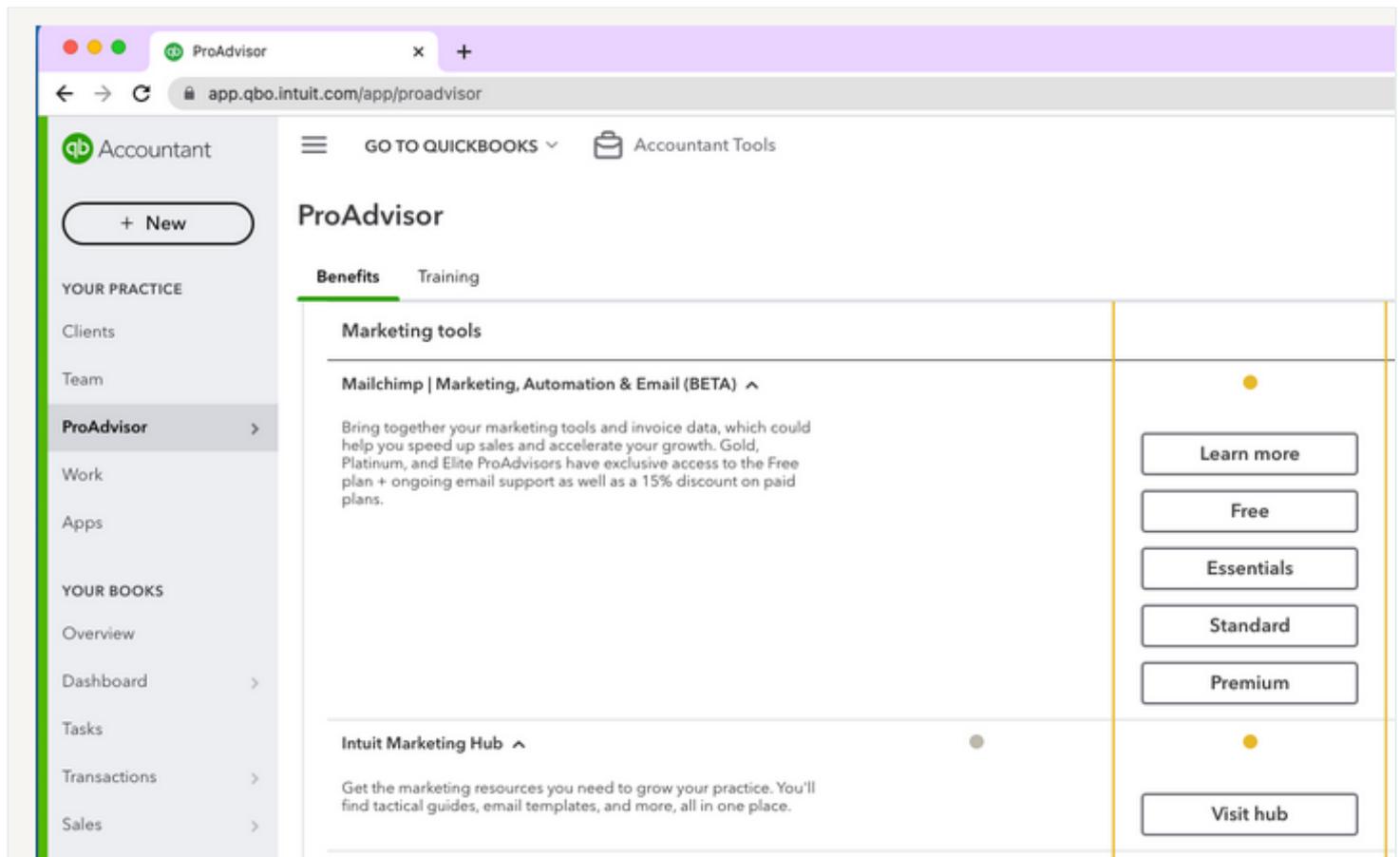
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Sales

To find out how Mailchimp is being used in a CPA's practice, I sat down with Jeff Wilson II, CPA, owner of The W2 Group (www.wiicpas.com) in Upper Marlboro, MD. Jeff has a full-service practice with several niches...

Scott Cytron • Jul. 20, 2022



While any time of the year is a good time to market your practice, secure referrals, and convert prospects, many accounting and tax professionals focus on retention and recruitment during the summer and into the fall when they are not as involved in tax planning and preparation.

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Scott Cytron: When did you begin using Mailchimp, and why did you choose that over some other name-brand competitors?



Scott Cytron, ABC

Jeff Wilson: We started using Mailchimp in early 2022, having realized that we likely reached the tipping point of all of the organic growth we would be able to generate. We needed to find a solution that would allow us to communicate with our current customers and facilitate marketing to new customers. When looking at marketing solutions, we identified Mailchimp as the most practical solution based on its ease of use, data insights, and API flexibility and integration.



Jeff Wilson, II, CPA

SC: That's great. Now tell me a few use cases for Mailchimp in your practice. How are you using it for marketing?

JW: We believe our customers can be pulled into our business via a journey. That journey typically starts with downloading lead magnets or other resources from our website. All of our lead magnets and resources are provided using Mailchimp. This allows us to collect marketing data from potential customers, and begins the journey of enabling future customers to understand who we are, what we are, and why we can service their needs. Next, we use Mailchimp to deliver additional marketing and information to these potential clients. The consistent marketing element that

Mailchimp allows helps lead the client on a journey to eventually buying services

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products. It helps us identify our top clients. It also helps us leverage that data to make essential decisions on the future of our sales and marketing campaigns.

SC: I know keeping track of leads can be difficult. What else are you integrating Mailchimp with, and how have those integrations been beneficial?

JW: We also integrate Mailchimp with our Monday.com system to manage our sales pipeline, prospects, and lead status. Mailchimp allows us to nurture our contacts and prospects in one place, and close our qualified leads in another. Our qualified leads are converted over from prospects in Mailchimp and pushed to Monday.com once qualified. This allows our sales team to focus on closing qualified leads.

SC: This has been great, Jeff. What's your advice to other tax and accounting pros who are on the fence about using something like Mailchimp in their practice?

JW: I say to think of your growth trajectory. Think of how you want clients to experience your business. Think of how you want future prospects to see your organization. Mailchimp allows you to give your current clients and future prospects a sense of who and what your organization stands for. It allows you to provide a consistent message about your services and your culture. The ease of use and integration Mailchimp provides is a one-of-a-kind service. With the integration of Mailchimp and QuickBooks Online, your organization can now market and communicate with clients and prospects just like a large organization.

More Information

Watch this special video by Hector Garcia on how to integrate Mailchimp with QuickBooks Online: <https://www.firmofthefuture.com/content/how-to-integrate-mailchimp-with-quickbooks-online>.

For a limited time, QuickBooks Gold, Platinum, and Elite ProAdvisors can get 15% off

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