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Free Guide

# 21 FANTASTIC WAYS YOU CAN CONTROLLABLY GENERATE QUALITY NEW CLIENTS

Discovered as a result of many mistakes, errors, failed campaigns and discouraging results.

*Written by father and son team, David & Joel Oliver*



## BACKWARDS, FORWARDS AND WHAT WORKS NOW

---

When I started this business, in a garage over 30 years ago, there were no computers, Smartphones or social media sites. Mobile phones and fax machines didn't exist. There was no Internet, no broadband or 3G. The only thing that was EE was the oxygen you breathed and tablets were something you got from your doctor.

Servers the size of vans were stored in warehouses. You kept your 'connections' not in cyberspace, but in a Rolodex on your desk. If you wanted to 'Like' or 'Share' something then you picked up the phone and spoke to someone. The 'cloud' was something you looked up to when talking to God and 'Apple' was one of your five a day.

Looking back, I can remember milestone events very clearly... My first mobile phone with a battery that weighed as much as a pallet of bricks; the amazement of your first computer followed by days reading the manual and hours clearing dot matrix paper off the floor from the kids' art efforts.

Or the day my trusty, genuine leather Filofax (which is now in a 'memory box') was no longer required and when the Internet finally became something that actually worked rather than grind to a halt as your ADSL router gave up the ghost.

### 'Son, it's changed'

When I tell my son this story (as we work together on this report) his look is one of disbelief. "How on earth did you do business?" he asks. "What did you do with all your time, Dad?"

Having worked with accountants and other professionals for over 30 years, we've always worked hard to help our clients stand out. In the early days, just doing 'something' was enough to generate a good ROI. Since then we have ridden many waves, from fax marketing and telemarketing to direct mail, websites, SEO, Social Media and now Mobile technology and Apps.

The truth is, today **the old ways of marketing for accountants don't work anywhere near as well as they used to**. They are largely tired, disjointed, and no longer effective enough to be used. And that's why my son and I have written this all-new report on proven ways to grow your firm.

Over the years, in our pursuit of marketing for accountants and other finance professionals, we've tried just about every possible way of 'lead generation'. Every idea we are about to share with you has been thoroughly tested - you can be sure of that because we have made some major mistakes and carried out a number of disastrous campaigns along the way. We've sent emails with errors, mailers that bombed and lost literally thousands of pounds. So what you're reading is a distilled list of what is **working right now and generating a profit** for other professional firms such as accountants, solicitors, IFAs, etc.

### Help to get started

And to help you kick-start your marketing activity and develop a plan that really works, we are offering every reader a **FREE 1:1 Marketing Clinic** with one of our senior team – see page 65.

We hope you enjoy it.

David Oliver | Founder | [davido@insight-marketing.com](mailto:davido@insight-marketing.com)

Joel Oliver | MD | [joelo@insight-marketing.com](mailto:joelo@insight-marketing.com)



## Testimonials

*A Breath of fresh air. As a leading proactive Scottish Accountancy firm for over 45 years, and ICAS member, seeing the MyFirmsApp solution is one of the most exciting things I've encountered in my career. It's a genuine breath of fresh air!*

**CARTERS**

*Fantastic news the above are now a client of Spofforths fee £10,800 per annum (£900 per month). Hopefully the first of many more conversions!*



*In a 1:1 with Insight I found them to be experts in the accountancy field, they are clearly a business who provide great advice in sales and marketing.*



*The Insight Marketing team explained interesting and straightforward practical strategies for accountancy practices to improve their service offering and grow.*



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# THE 21 GREATEST LEAD GENERATION TIPS, TRICKS, IDEAS & PLANS

## A fish out of water gasping for air or a hummingbird in flight

You may not know everything about our business yet, but we run Insight Marketing, salesforaccountants.com and MyFirmsApp. The unique thing about our team is that we do what works! Our entire ethos, our job, is to generate meaningful results for our customers.

Like you, we have to respond to changes and develop new marketing activities that work in every new environment. And that means we have tried just about every modern day 'lead generation' marketing activity that exists.

So, before reeling of scores of ideas, tips, tools and techniques for you, it's important that we all understand that the professional services industry is not simply changing... It has already changed - *forever*.

So how should you respond?



### Become a hummingbird!

The hallmark of any successful firm is its agility. Flexible, open-minded firms, who are ready to embrace technological, commercial and economic changes, will prosper. They will attract like-minded clients who want far more than a 'traditional professional' can offer, and they will be prepared to pay for it.

Agile firms will be responsive, lightweight and decisive. They will be early adopters, embracing new routes to market, prepared to take a few risks in pursuit of significant reward and profits. Rewards that the current adopters of App technology are enjoying right now – [see page 65](#)

### Respond decisively and professionally

Historically, agility meant adapting and reporting in a matter of months. We had the luxury to think, prepare and decide. It's a little laughable now, but we have spoken to firms whose policy was to ride the third or fourth wave. Wait that long now and you'll be like a fish out of water, staring at a reducing client base, rising attrition and reducing income.



## Attracting the people who want to buy from you

One of the keys to successful, modern lead generation is to accept that only a percentage (usually a small one) is predisposed, ready and willing to buy the service you offer.

The historical model of lead generation was based on outbound marketing. This old-fashioned scatter-gun approach depended on contacting the right person, at the right time, on the right minute of the right day. It was effective until professional firms starting marketing themselves seriously, when the cost per client acquired started to soar.

Successful firms now develop inbound marketing campaigns – effectively attracting the quality clients you want to work with, so that when they have a need for your services they contact you. This removes the need to ‘sell’ your services and instead deal only with quality, educated and informed potential customers.

## How to get high quality clients coming to you

You need to develop and perfect ways of attracting buyers before they go to your competitors. Typically, you'll need to use a variety of methods to first attract them and then convert them.

This report looks at proven ways you can develop an inbound marketing model yourself, with our help or using another marketing agency.

The graph below demonstrates the various stages of the inbound model.

ATTRACT	CONVERT	TAKE OFFLINE	CLOSE	SUPER IMPRESS
 Database	 Landing Pages	 Web chat	 Face to Face Meeting	 Client App
 Email Marketing	 Website Forms	 Call the lead	 Clear Follow Up	 Customer Survey
 Free App	 Calls-to-Action	 Qualify	 Awesome Proposal	 Great Service
 Pay Per Click	 Web chat	 Arrange a Meeting	 Win the client	 Referrals
 Cold Calling	 Push Notifications	 Test & Measure		



## Developing a contact list of your future clients is critical

To generate leads you need to carry out a mixture of inbound and outbound marketing and that requires a contact list of potential prospects you would like to work with - a database of people who can be targeted using some of the ideas shared in this report.

Getting this list right is absolutely critical. Unless you are a national firm, it's likely your potential clients will be local to your office(s), normally within a 20 – 40 mile radius or a 30 – 40 minute drive away. That's not to suggest you couldn't or wouldn't work with a client further away, but when focusing your lead generation activities, it's normally best to start close to your offices and work outwards.

Drawing a radius around your offices and reviewing a local postcode map is a great place to start.

### Who to avoid?

This exercise is not simply about where you want to target. It's about who you really want to work with – this is often easier to consider when reflecting on the type of customers you 'don't' want to act for:

- Are there industry sectors you don't want to work with? (Government, Schools, Colleges, Charities etc.)
- What size of business do you want to avoid? (Perhaps those over the audit limit, perhaps one-man-bands etc)

### Who do you 'really' want to work for?

Once you have agreed who is off your target list, ask yourself are there any companies you 'really' want to work for?

Perhaps you have one or two areas of specialisation. (Vets, doctors, dentists, contractors are most common.) These can be marketed to very specifically using highly focused messaging for higher response rates.

### Database profiling and prospect searches

As part of your 1:1 clinic, we will run a database profiling exercise for you, which includes a free prospect search. This exercise shows you how many companies with your unique search criteria are available in your area.



## Email Marketing that works

Over 80% of the people who read this report will have received it as a result of email marketing. It seems fitting for a report on lead generation, doesn't it? Email marketing is one of the highest ROI marketing channels available. That's why we are offering this guide to everyone on our database who we believe will find it a useful resource.

To get a great return from email marketing you need to follow a tried, tested and proven process. Over the next few pages we will reveal for the very first time the complete **Insider's Guide to Email Marketing**.

## It doesn't work like that!

Let's address this first; email is one of the most powerful lead generation tools for professional firms. But you need to have realistic expectations. Some firms 'attempt' email marketing and expect everyone to open the email and reply.



It doesn't work like that!

Email marketing works on the principle of using electronic marketing to do the ground work, to push a message out en-masse that encourages interested people to go to a particular place for more information - normally to a webpage, landing page or similar.

Only a small percentage of emails will be opened; a percentage of these will then click on your email, and a percentage of these will then respond.

The percentage response rates for email 'opens', clicks and enquiries generated will vary depending on many factors, and these are explored over the next few pages. You'll recognise that this percentage of a percentage of a percentage means you will inevitably end up with a small number of positive responses.



## Don't use Outlook!

No 1 rule - Do not send out emails using Outlook or your internal email system.

You need to use one of the specialist email service providers who have systems in place that ensure your emails get delivered and unsubscribes are handled automatically. They provide vital stats on your campaigns and stop your own IP address being marked as spam.

These email providers mean that sending emails is fantastically and reassuringly simple using their systems. We use three: Pure360, Mailchimp and Rapidmail.

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We are not a reseller, so our recommendation is unbiased. In our view Mailchimp is an absolute must for any firm that wants to use an email-marketing platform. It's so simple to use, highly effective, low cost and it integrates with many CRM systems.

Mailchimp also offers lots of integrated forms, providing opt-in form plugins to your website. This means visitors can sign up via your website, be added to your email list and automatically receive autoresponder emails at pre-agreed intervals.

Mailchimp is free of charge for up to 2,000 users (email addresses) and up to 12,000 emails sent out each month.

Don't forget you can import both client lists and prospect lists into Mailchimp (providing they have opted in). This often simplifies client communication and makes email messaging painless.

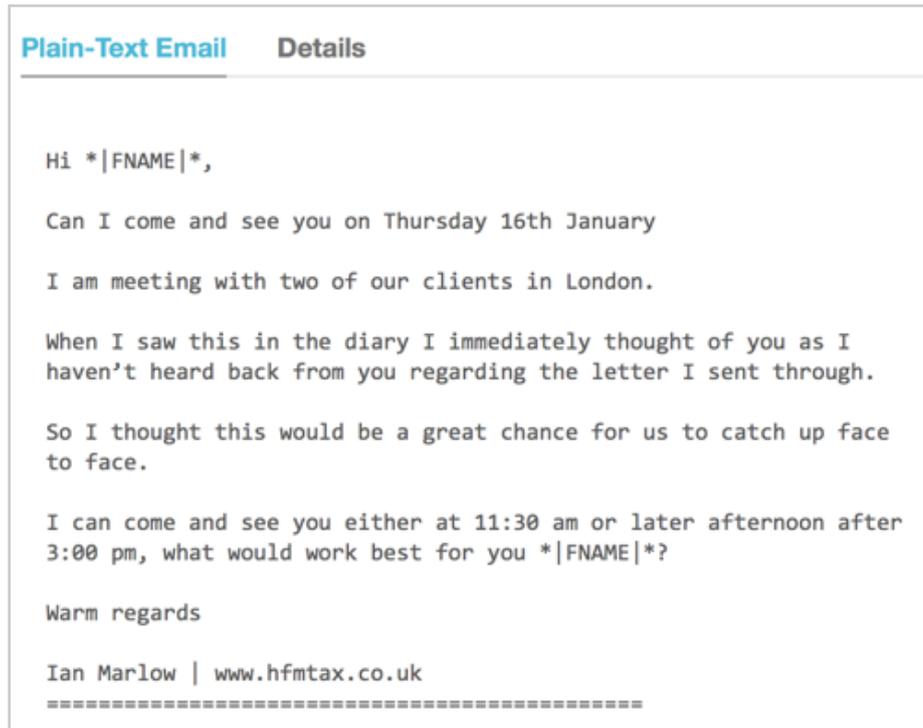
## What type of email should you send?

Once you have your email system and list set up, what type of email should you send? Should it contain images or should it be plain text only.

We've spent years testing emails with images (HTML) against those in plain text. The response rates vary, and the pros and cons for both are well documented and easily explored online if you wish to.

We recommend a mixture of both, and here is a very basic look at both Plain Text and HTML.

### Plain Text



### Generally speaking plain text emails:

- ✓ Are easier to create – simply type and then send.
- ✓ Display consistently across all email platforms and devices (phones, tablets etc)
- ✓ Can feel more personal than HTML emails
- ✓ Are often perceived as less 'salesy'

### Reasons against plain text:

- ✗ You cannot use colours or graphics
- ✗ You cannot use words like 'click here' with inbuilt links to your landing page. You must type out the URL.
- ✗ It is harder to break up into easy to scan or read sections
- ✗ Tracking of emails is more complex

We use plain text emails if we want to send a short message that doesn't require multiple links or complex tracking. They are perfectly suited to personalised, direct messages with one offer.

## HTML

**HfM**  
Tax & Accounts

**Your free app from HfM Tax**

**Anywhere, Anytime, in Real Time**

Good Morning XXXXX,

HfM Tax is a leading, proactive firm of accountants. We are always looking at ways we can improve the service that we offer companies and individuals across London. That's why we took the decision to launch our very own App. It's available to you today completely free of charge to download and its available for iPhone, iPads and Android phones and devices.

**DOWNLOAD YOUR FREE APP HERE**

**What does the App do?**  
The App has been developed by HfM Tax to give you all of the following:

- ✓ Free to download, use and share with others.
- ✓ Helpful time saving calculators at your fingertips.
- ✓ Key UK Tax, Pension and Finance Rates.
- ✓ Important Finance Diary Dates.
- ✓ Never Loose a Receipt again with in built photo receipt management
- ✓ Mileage Tracker (IOS)
- ✓ Real-time tracking of Gold & Metal Prices.
- ✓ Latest News and Offers from HfM Tax
- ✓ Improve Efficiently

**See what a proactive firm can do for you today**  
Many companies don't realise what a proactive firm of accountants can do for them. They are used to using the same firm year after year. With one or two predictable meetings during the year and a big bill!

Why not see what a proactive firm of accountants can do for you simply reply email with 'YES' or [contact us](#). We can then arrange a free face-to-face meeting to chat together.

Yours faithfully,  
*Ian Marlow*  
Ian Marlow | [www.hfntax.co.uk](http://www.hfntax.co.uk)

P.S. Do feel free to share the App with any of your colleague's or connections who you think might find the App useful.

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Click here to download your copy of our App **REGISTER**

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Available on the **App Store**  
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Visit website

## With HTML you can do more:

- ✓ Carefully track which emails are opened
- ✓ Make text links clickable
- ✓ Use images and colour
- ✓ Incorporate your branding
- ✓ Easy to break up content using columns, headers etc. (great for newsletters etc.)
- ✓ Enable responsive design so adapt content for Smartphone, tablet users
- ✓ Frequently generate a more interactive response

## Reasons against HTML emails:

- ✗ Need designing, coding and testing. Therefore they take longer
- ✗ Are complex and therefore often get broken on certain email platforms
- ✗ Images are often blocked
- ✗ Can appear less personal and more salesy.

We frequently use HTML emails when we have a pre-planned message to send that can be designed and developed in advance.

## Expect 50% + of your users to open the email on a mobile device

When sending your emails you should anticipate that 50% or more will be opened in a mobile device. This figure will grow as Smartphone and tablet use booms and PC sales decline.

So when writing, designing and developing emails you must consider the mobile user. That's why wherever possible you should send them using a 'responsive template' i.e. an email that responds to the size of device being used to view the email.

Here is one example:



# An example of how not to create an effective email

To give you an idea of some of the pitfalls in writing and designing emails, here is an example we received just a few days ago.

The screenshot shows an email advertisement with a blue header and footer. The main content area has a white background with a blue sidebar on the left. The header text reads: "Bookkeeping is what makes the difference. Find and compare the best UK accountants!". Below this is a blue box with white text: "Does your bookkeeping involve piles of paper, and systems seem somewhat outdated? Do you feel you have to do your own research on tax laws? Do you wish you got clearer answers to your questions? If so, you should consider switching your bookkeeper." The sidebar contains the text "The perfect bookkeeper will:" followed by a bulleted list: "stay up-to-date with all changes in tax legislation", "have access to top accounting systems", and "provide you with expert advice on your finances". To the right of the list is an image of a calculator and a pencil on a spreadsheet. The footer text says "Click for a free no-obligation quote".

**Bookkeeping is what makes the difference.**  
Find and compare the best UK accountants!

Does your bookkeeping involve piles of paper, and systems seem somewhat outdated? Do you feel you have to do your own research on tax laws? Do you wish you got clearer answers to your questions?  
If so, you should consider switching your bookkeeper.

**Compare accountancy services prices!**

The perfect bookkeeper will:

- stay up-to-date with all changes in tax legislation
- have access to top accounting systems
- provide you with expert advice on your finances

Click for a free no-obligation quote

## Here are our comments:

- ✗ There is no opening salutation (Dear xxx) or greeting [Good morning']
- ✗ The sub-head 'Find and compare the best UK accountants!' doesn't have any relevance to the main header. Are they saying that bookkeepers and accountants are the same people? Lots of accountants would dispute that!
- ✗ The body copy 'Does your bookkeeping involve... ' is poorly written and the call to action 'you should consider switching your bookkeeper' is devoid of any benefit.
- ✗ The central header 'Compare accountancy services prices' puts the emphasis on price – always a poor option when there are so many other more tangible benefits like helping you run your business more efficiently, removing the hassle of bookkeeping, etc.
- ✗ The bullet point list 'stay up to date...' is poorly designed with a single word on several lines, making it extremely difficult to read and understand.
- ✗ There are no contact details, no name you should contact, no telephone number. There's only a link to a Free no-obligation quote.



## Copy and the all-important subject line!

So, let's move on. You're adding more names to your database, your sign-up plugin has been a roaring success and now you're ready to send out your first email campaign. This can only mean one thing; it's time to get started on the text – often called 'copy'.

The starting point is what your recipients will see first; the all-important 'Subject Line'. This will make or break your email campaign.

Here are our top tips for great subject lines:

1. Always write 4 subject lines (Two for the first email and 2 for the re-send) using AB testing\*
2. Keep it short, ideally below 50 characters
3. Avoid spam words like – Free, Offer, Save, Help, Percent Off, Reminder
4. Inform your reader what they can expect from your email. Avoid trying to be too clever
5. Add their name into the subject line
6. Personalise by industry or geographic area, for example 'Accountants in Derby' or 'Tax Review for Derby Vets'
7. Create urgency using words like Alert, Breaking, Update etc.

*\*When sending an email, you should first send a small email test using 2 different subject lines. This is known as AB split testing. Most email programs like Mailchimp and others will allow you to do this. It will then select the most popular one and send the remaining emails using that subject line.*

A week or so after you send the first email, you should re-send it to the same list. However, you must send it on a different day and at a different time. Again using split testing, enter 2 brand new subject lines. The re-send will typically achieve 50-60% of the response of your first email.

## Use the customer's name in the body copy of your email

Using a customer's name personalises the email and will often help to improve the percentage of emails opened and read. Despite this, 85% of companies who collect subscriber data do not personalise their emails!

Insert the customer's first name in the body of your email in several places – once at the start, again in the first paragraph and perhaps once more at the end.

## Don't use 'Dear'

Using the opening line 'Dear Mrs. X' will frequently get your email blocked by spam filters. That's because most people don't write like that. So compose your emails as you would speak, in a chatty, friendly style. Perhaps starting with 'Good Morning' or 'Good Afternoon'.



## What happens when I land?

Once you have developed a successful email it will generate you click throughs or visitors. Sending them to a general web page will result in a poor conversion rate (and ROI). Therefore you must carefully consider the landing page you direct your traffic to and consider using 'unbounce' or similar landing page facility. See page 65 for more details on landing pages.

## It's all about them!

OK, now you have a great subject line and you've personalised your email with a soft introduction. The next thing to focus on is the message you want to get across. But remember, you should always focus on your customer or prospect when you write. They aren't remotely interested in reading about you. They want to know how this email affects them. Make them feel the centre of attention.

As a general rule, customer-focused words should be used in a 4:1 ratio. So every time you use a self-focused word such as 'we', 'our', 'I' or your company name, you need to include in your copy at least 4 customer focused words such as 'you', 'your' or 'yours'. Subtle changes to the text like this can make a huge difference to your response rates.

Remember, this is only guide; it's not a cast-iron formula. There will be times when you might do something as a firm and the only genuine way to explain it is to talk about yourself.

## Be Relevant

The digital marketing landscape is constantly moving. Despite many people predicting that email would decline, it is continuing to grow. According to Forrester Research, by the end of 2014 individual consumers will receive 9,000 emails annually on average. For many of us, in our business lives it might feel like we're getting 9,000 a week! So when writing emails you have to consider the context and the mental modes of your audiences when you are addressing them.

Write to your audience with sincerity. Give them information that's relevant and of good value. Take opportunities to get their feedback; ask them what they are interested in and want to read about. And keep it topical! If you help a client to save some tax, write about it. If you help them reduce their national insurance, or have a way for local companies to do better, make more profit and manage their businesses better, then explain it.

A word of warning! Inappropriate content is the number one reason that customers give for unsubscribing to an email list. If they feel they are receiving emails that have no relevant information for them, they will hit the 'unsubscribe' button – fast!

## Who should the reply go to?

Email marketing is about being personal, not heavy handed or 'salesy' and not over corporate. So when you are writing an email make sure it appears to be written by a genuine person who the recipient can reply to. Yes, this person will have to manage the inbox and delete a few 'out of the office' replies, but the bigger benefit is in being able to create and manage a relationship with an existing customer or a potential new client.

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Beautiful Apps for Professional Firms  



Globally approved  
by Apple and Android

## Launching your own App is an absolute must

The world that we all operate in has changed, and having your own App is now one of the most powerful ways your firm can:

- ✓ Protect your customers
- ✓ Save time and money
- ✓ Differentiate your firm
- ✓ Generate referrals
- ✓ Market your firm
- ✓ Integrate your systems



Launching your App using MyFirmsApp will help you build deeper, more valuable relationships between your business and your customers. Providing a powerful solution with multiple opportunities to engage using approved tools, features and content.

Globally approved by Apple and Android – the solution is trusted by over 100,000 end users, loved by clients, endorsed by industry leaders.

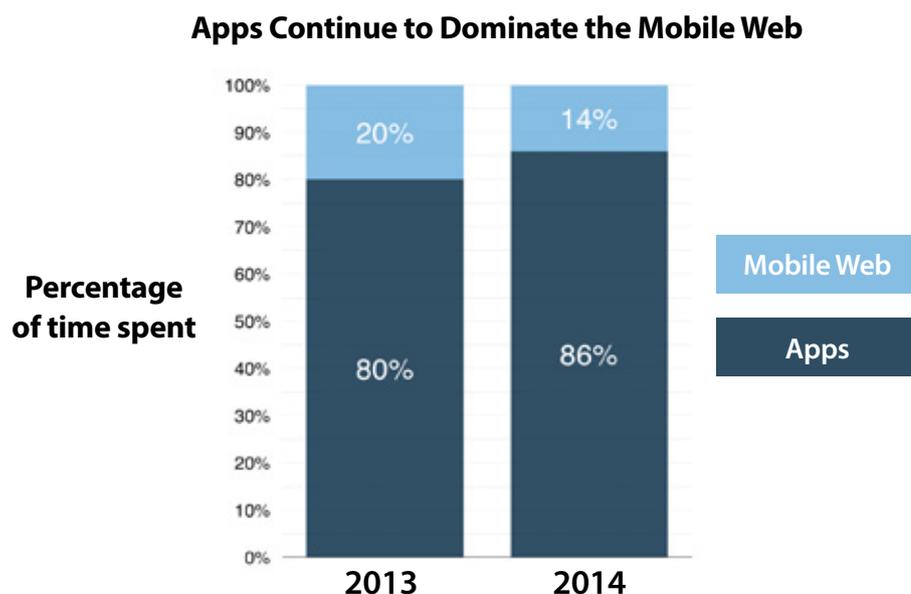
## A proven way to launch your own App

In many senses 'The App' is fast becoming one of those milestone events I spoke of in the introduction, just like the first PC or launching your very first website. I remember back in the 1990s people wondered why they needed a website. I see the same response to Apps today. It's all very 'new' and therefore a little 'unknown' but it's also very exciting and represents a great opportunity for firms willing to 'climb on board' and take advantage.

For most people reading this free report, the majority of your clients and potential clients are already using Smartphones, tablets and Apps. So reaching out to them, using the technology they are all using, makes very real commercial sense. It's even better when you can achieve all this at such low cost and without any involvement required from you.

## App use dominates mobile web

It's not simply App use that's growing, it's also dominating the mobile web. 80% of the time spent browsing the internet from a mobile device is done via an App.



## Respond now and you will benefit from:

- ✓ Launching your App while there is significant demand and limited supply
- ✓ Building your App user base while enjoying minimal competition
- ✓ Securing your firm's name in the App store - this will become increasingly important
- ✓ App technology at its lowest price. As features and integration expand, prices will go up.
- ✓ Early exposure, PR, Awards etc. as an early adopter of App technology

## Bringing your systems together in your App

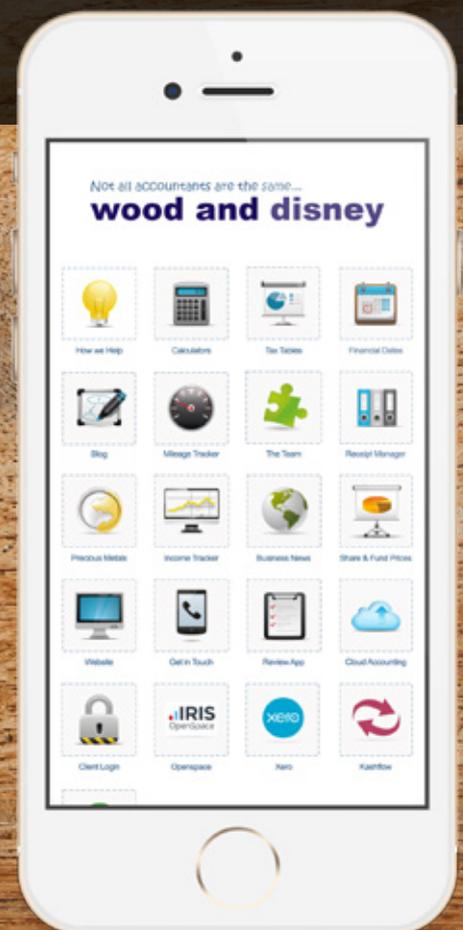
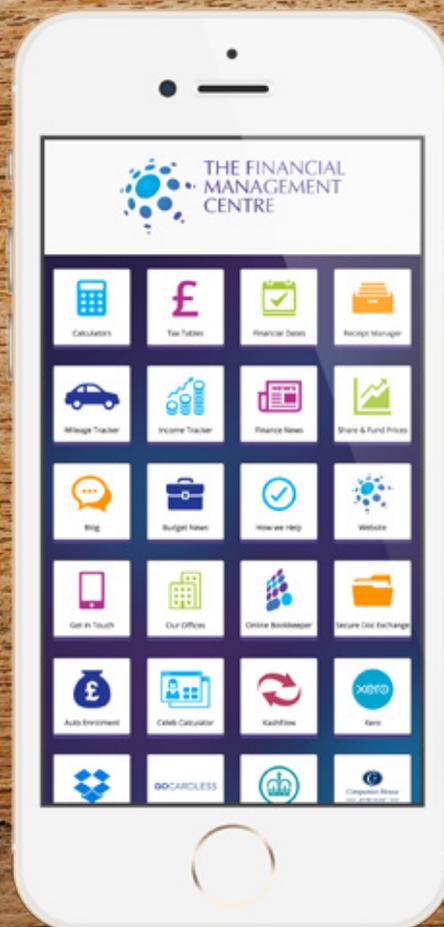
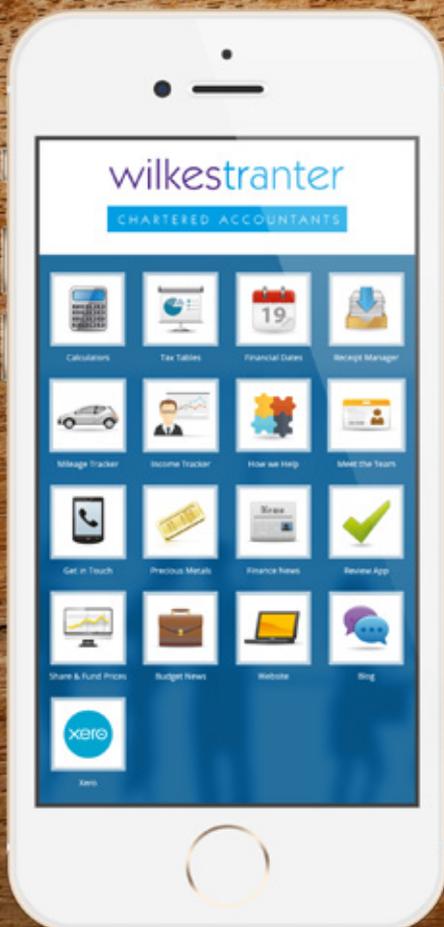
Our team of leading developers is able to bring systems together and make them more accessible for your customers and future clients. There are integrations and in-built solutions available such as receipt and mileage tracking, income management and your core service offering.

What's more the My Firms App platform is proven, it's tried, tested and in use by over 100,000 end users and hundreds of professional service firms around the globe.

*"I just wanted to send you a quick email to say thank you for your work on the app. It's been an excellent tool for the practice, we've had numerous benefits. One area where we regularly see it working is with new business generation. To give you one example, just last week we had a new Barrister client join us who had come across our App. She really liked the tools and the fact that it was such a helpful and different way of supporting clients. It was enough for her to get in touch and then with our strength of experience in this sector – a new client was won! It's great to see the App initiating contact like this and supporting our reputation."*

Mason Bloom | Partner

Silver Levene 



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## Push Notification communication

For the majority of firms, even sending an email to customers can be a real effort. Now there is a far more efficient, time-effective and well-received form of communication – Push Notifications. A Push Notification is a short message that App clients can send out to all their App users. It takes just seconds to write, it's sent instantly and it automatically lands on all your App users' phones or tablets.

Think about it for a moment... In seconds you can reach your App users, without any extra cost and with less effort and time than any other route while enjoying the highest open rates of any current form of marketing!

And now thanks to a handy in-built scheduler, you can even plan your messages for a month, quarter or even the entire year in advance.

## Win new clients and generate a rapid ROI

Most firms would be happy for a 2x return on investment. For some customers, launching an App has achieved that in its first week! Launching an App generates leads for you in 3 different ways.

Increased Referrals

Direct Enquiries

App Promotion

Thanks to a very carefully tried, tested and proven marketing launch pack, you can enjoy all the tools needed to get a great ROI from your App: QR codes, Push Notification Messages, Emails, Website copy, Letter templates and much, much more.

Your App will also become a talking point. Giving away a 'Free App' is powerful, it implies:

You are different

From their existing advisor

You are technologically advanced

Their current firm are old fashioned & out of touch

You care enough to launch a free App

Their current advisors don't

You are proactive and prepared to reach out

They have not heard from their firm since the last bill

You are smarter, more forward thinking and creative

Than the stereotypical, dull firm

## Your free App demonstration

### Discover how an App will:

- ✓ Designed for you, effortlessly differentiating your firm
- ✓ Protect & prepare your firm for the future
- ✓ Become the interface between you, your clients & your systems
- ✓ Save you hours of operational time
- ✓ Become an essential tool that your clients & prospects will love
- ✓ Win you new customers
- ✓ Be constantly updated and managed by us



UK 01325 469603

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[demo@myfirmsapp.co.uk](mailto:demo@myfirmsapp.co.uk)

*Register Free*



[www.myfirmsapp.com](http://www.myfirmsapp.com)





## Specific, targeted use of LinkedIn

Many people jump into social media without a real plan. And generally speaking, the results are just as haphazard. This section will show you where to find the real wins.

## Start with an integrated blog

Make managing your social media simple with an integrated blog (see page 23). This means that each time you blog, all your social media profiles are automatically updated for you. It will save you hours and will enable you to generate leads from your blog and social media networks.

## Get LinkedIn working properly for you

4 out of 5 UK professionals are now on LinkedIn so it's a medium that has significant impact – as long as it is used correctly. We have written an entire report on this: *'Unlocking the Power of LinkedIn'*.

As long as you have all the basics right, one of the big wins on LinkedIn is using it for active referral generation. In the financial profession the very best customers come from client referrals. They are high quality, easy to close and will save you enormous amounts of time in 'cold' prospecting.

However, getting a referral from a client can be a little cumbersome. Most of the firms we speak to just don't have a system to go about it. And even when a client is asked for a referral they often say 'let me think about it' and the opportunity is lost.

*LinkedIn* makes referral generation really simple. LinkedIn removes these obstacles by providing you with a system to pinpoint exactly who you wish to be referred to. Even this task is one you can get any staff member to do for you before meeting a client.

Before you meet your client, visit LinkedIn and look at their connections. Spend just a few moments seeing the people they are connected to and what they do. Then make a note of these people in preparation for your meeting.

No longer will you have to ask 'Is there anyone you know who might like to use our services?' Instead you can say – "I have seen you are connected with xyz on LinkedIn. That's a business we would love to be introduced to. Would you be kind enough to connect us via LinkedIn?" That's so much more powerful, isn't it? What's more, if you have followed the steps outlined in our LinkedIn report then you will already have a recommendation on LinkedIn from the client you are meeting.

*Use LinkedIn groups to expand your reach.* Connecting to groups is a fantastic way to expand your connection base and reach. Simply look for key groups in your geographic area and join them. Then share articles, comments and views that are relevant to that group. Don't sell, just share, and slowly you will see that this is another great way to generate top quality leads through LinkedIn.

*Unlocking the Power of LinkedIn*

- ✓ **Discover how to get LinkedIn working**  
From profile creation to referral generation
- ✓ **Learn what is working**  
See what is working for your fellow professionals
- ✓ **How to share, track and promote content**  
Learn how to get great content, share and track it with complete ease

*click here for your free eBook* → **Get your copy here**

Unlocking the Power of LinkedIn For Those in Finance  
Written for Accountants, FPs, Financial Advisors, Planners & Wealth Managers  
How you can make LinkedIn really work for your business

25 Yrs  
TRUSTED BY ACCOUNTANTS

## 2 examples of firms who are making LinkedIn work

**CBHC** Chartered Accountants

CBHC Jobs Are you recruiting?

Search site Search

HOME ABOUT PEOPLE SECTORS ADVICE NEWS TOOLS CONTACT

ACCOUNTANCY  
AUDIT  
BUSINESS ADVISORY  
CORPORATE FINANCE  
WEALTH MANAGEMENT  
TAXATION

**Chelmsford Office**  
01245 495 588  
**Romford Office**  
01708 333 300  
Email  
info@cbhc.uk.com

**Passion | energy | commitment**  
Chartered Accountants for Essex and London

Successful companies have financial data at their fingertips, make informed decisions based on strategic analysis, and know exactly where they're going. And we can support you every step of the way.

CBHC is one of the largest accountancy practices in the South East, with offices in Romford and Chelmsford. More than just number crunchers, we pride ourselves on our added-value range of financial services, all of which are designed to make a tangible difference to our clients' bottom line. This is why over 2,000 SMEs in Essex, East London and beyond trust us to help them achieve their business goals.

One partner in CBHC took the decision to take LinkedIn seriously. And after reading one of our reports and attending a webinar, he put the learning into action.

### The result?

They won 11 quality clients from LinkedIn because they used the 2 ideas outlined above, and those shared in our *Free LinkedIn Report*. The clients they won had been pre-selected as potential clients of exactly the right type. They all became high quality, fee-paying customers with two of them generating over £30,000 per annum in recurring fee income.

### Some of the steps that the partner took were:

- Read the report and had their 1:1 call (see page 65)
- Updated their LinkedIn personal profile and photo
- Connected with their clients and gained written LinkedIn recommendations from them
- Used LinkedIn to ask for specific referrals (see above)
- Expanded their network via LinkedIn groups (see above)
- Helped clients not using LinkedIn to join
- Shared the response and results with fellow partners to encourage a practice-wide approach



## Yorkshire accountants

Supporting Business - Maximising Potential

### The number one choice of accountants for ambitious businesses across Yorkshire

Welcome to Whitesides Chartered Accountants, providing quality accounting and business support in an approachable and friendly way to help businesses achieve growth and success.

Whether you're in marketing or manufacturing, property or professional services, farming or fashion, Whitesides are **THE** recommended accountants in Yorkshire. We have a wide ranging client base including Manufacturing, Construction, Wholesalers, Property Developers, Solicitors, Doctors, Dentists, IT and Leisure Industries. We're experienced and professional but approachable and friendly, and have a growing reputation for helping local business owners face the challenges of the new economy.



Whitesides accountants are a small, proactive firm of accountants in Leeds. They took the decision to take LinkedIn seriously and have enjoyed great results using it as a great source of leads for their practice. They achieved this following these simple steps:

- Had their 1:1 call (see page 65)
- Updated their personal profiles
- Connected with their current clients and potential customers
- Joined appropriate groups
- Watched, listened and commented on conversations
- Gained comments of thanks
- Expanded their reach and generated great leads as a result



## Use our integrated blogging platform

Companies that blog once or twice a month generate 70% more leads than those that don't! Yet many professional service businesses don't blog, simply because of the amount of time or the skills it requires.

That's why our team developed a unique way to set up and integrate a blog so that it feeds your entire marketing system – saving significant amounts of time and generating new enquiries.

Here's how... Normally, a business that blogs uses WordPress or something similar to write and post it so the blog is displayed on their website. That's the full extent of its reach and it relies entirely on Google picking it up which might happen if it's been optimized correctly, but in our experience, most blog articles we read have not been!

Our system works differently. It not only links your blog with your website, (and fully optimizes it so it ranks on Google) but it also links it with all the social media channels of your choice, automatically sharing your blog with your followers (LinkedIn, Twitter, FaceBook, Google+ etc). This means more people read your blog and your social media accounts are constantly updated so you gain new followers and build your inbound traffic.

The integrated blog also links with your App, if you have one, and that means all your App users will receive the blog directly to their tablet or Smartphone. You can also promote your blogs with scheduled Push Notifications.

## Isn't it time your firm had an integrated blog?

Enjoy the considerable benefits of only having to post something once – and get maximum coverage.

To discuss how you can have an integrated blog developed for you in just a few days, simply call **0800 80 30 826**



## **6 ways blogging can generate leads for you**

Apart from the integrated blog saving you a lot of time posting to individual places, you'll also benefit from generating far more leads.

# Here are our top 6 ways blogging can do this for your firm:

## 1. Blogging can boost your SEO efforts considerably

Google loves blogs because they constantly provide new and updated information. That means if you write a blog in the right way it will improve your SEO efforts. Here's how you can ensure your firm's blog generates leads in a specific area.

## 2. Choose one keyword or phrase and write or tweak the article to focus on that

Ideally pick one keyword or phrase that your blog will focus on. Initially this might sound difficult, but give it a little thought and you will quickly come up with some great ideas.

HMRC delay payroll penalty regime	Buy-To-Let Landlords
HMRC attacks LLP's as Tax Avoidance	High Income Child Benefit Charge
IRIS & Kashflow	Company Car Allowances
Crowd Funding	Preparing for budget Season

So decide on a topic that's current and topical and then focus your article on this. Remember, it's quality content that matters. The higher the quality of the content, the better the chance it will rank in the search engines.

Remember, just like all your marketing and lead generation, if it's 'niche' it's even easier to score points. Blogging on topics appropriate to 'vets' or 'doctors' for example will improve your SEO in these sections. Plus, because your blog is topical and focused on a niche, it's far more likely to get shared within that niche.

## 3. Add the phrase to your page title and meta description tags

A good SEO friendly post title (blue below) is readable, contains your focused keyword (in this example 'How to Close Apps on iOS7') and is within the 70 characters limit.

[AVN Arena Accountants in Kings Lynn | How to Close Apps on iOS7 ...](#)  
 avnarena.com/avn-arena-accountants-in-kings-lynn-how-to-close-apps-o...  
 26 Nov 2013 - As more and more of our clients are using iPhones, iPads and other iOS devices we wanted to blog about closing Apps in iOS7. So you have ...

Repeat the key phrase in your blog's meta description (in black above) so Google can see that the title and description match.

## 4. Then add the key phrase to your blog copy

You mustn't spam your blog, but equally you should have a clear goal to repeat and use your key phrase in the blog itself. Try, wherever possible, to use it early on and in the H1, or H2 of your article.

Ideally you are aiming for a 2-5% keyword density. Much more than this and you may be penalised by the search engines.

## 5. Blogging makes you an expert and that's good news for advisors

71% of Hubspot respondents said that when they see a business blog on a website it influences their decision whether to use that company. So you can immediately see how important it is to have a blog. And as trusted, professional advisors, a blog helps reinforce your credibility.

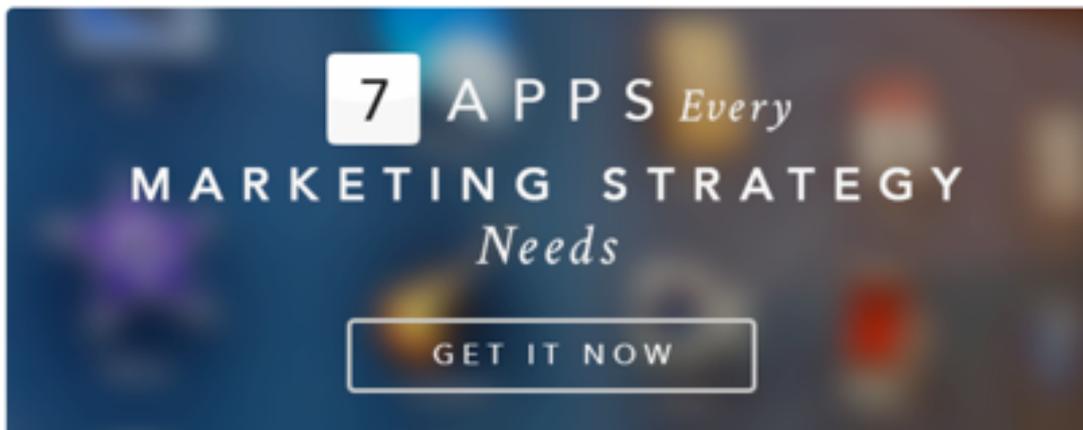
By writing about a problem that your customers and potential clients may have, you will be seen as a problem solver. There's no hard sales message, no self-promotion. You are simply providing advice just like you would if you were networking. This time you're passing on the information through your blog, and that means your comments have the potential to be passed on to many, many more interested people. As a result, you will be recognised as a trusted advisor, your profile will be raised and in due course, you will generate leads.

By working in this manner you earn peoples' trust. And this is an important benefit, especially to professional service providers. Remember that many of your blog readers are not yet clients; you probably don't even know who they are or have them on a database.

## 6. Blogging allows for easy calls to action (CTA) and internal links

Make sure each blog you write has a clear Call To Action (CTA). In an ideal world the offer will match the content. For example you could be writing about a VAT topic and offer a FREE VAT REVIEW. This will also help turn your blog readers and visitors into leads.

See the example CTA's below





## Google Pay-Per-Click and the power of Re-Marketing

*“Why we have spent thousands with Google and why we LOVE giving them our money”*

Getting your site to rank in the top 10 search results for Google and others is hard work and takes time. One way to ensure you are at the top every time is through Pay-Per-Click (PPC) marketing. You can ask our team to manage this for you for a small charge or manage it yourself.

Pay-Per-Click allows your firm to promote your practice to someone actively searching for phrases that you choose. You can change the message, the amount you want to spend per click, the time of day your ad is visible and even the geographical region in which your ad will display.

That means that if you wanted to get top position on Google for ‘Financial Adviser in London’, for example, you could start a Pay-Per-Click campaign with that phrase. Set up correctly, it would mean that your Google ad appears when someone types that exact phrase into Google, but you only pay if they actually click on your ad and visit your website.

## What are the benefits of Pay-Per-Click Marketing?

Pay-Per-Click is a proven way for professional firms of all sizes to generate cost effective visitors and sales. In our experience, it is one of the most controllable forms of marketing.

The benefits are:

- Low risk - you only pay when someone visits your website
- Highly targeted and controllable
- Fast – generates traffic almost immediately
- Easy to understand reporting
- Measurable return on investment
- Simple to amend and improve
- Marketing messages, timing, geography and delivery are all controllable

## Example of paid for listings and natural

Paid for ads are those that appear in the image above at the top of the search results with a yellow Ad tag and on the right hand side. When you pay for a Google ad, this is where your website details will appear.

About 3,470,000 results (0.53 seconds)

Cookies help us deliver our services. By using our services, you agree to our [Terms](#) and [Privacy Policy](#).  
 [Learn more](#)

**Online Accounting-Try Now - crunch.co.uk**  
**Ad** www.crunch.co.uk/   
Accountant Software + Accountants, V... 50/month!  
Crunch Accounting has 554 followers on Google+

**Sage One™ Accounts Online - sageone.com**  
**Ad** www.sageone.com/FreeTrial   
Manage Business Finances Easily From Just £5 A Month. Try Free Now!  
An Attractive & Easy To Understand Interface – TechRadar Pro  
Sage One UK has 179 followers on Google+  
Easy Online Accounting - Take A Free 30 day Trial - Sage One Cashbook Online

**Accountants Tax App - myfirmsapp.co.uk**  
**Ad** www.myfirmsapp.co.uk/   
Trusted by accountants proven to work, see the App free today here  
You've visited myfirmsapp.co.uk many times. Last visit: today

**Accountants Tax App | Finance iPhone & Android Apps | IF...**  
www.myfirmsapp.co.uk/   
The leading finance Apps for accountants, IFAs and IFPs – free demo.  
Free Demo - Silver Accountancy App - FAQ - Gold  
You've visited this page many times. Last visit: 21/03/14

Also paid for listings

Paid for listing

natural ranking

**Ads** ⓘ  
**Google Apps for Business**  
www.google.co.uk/Apps/Business   
0330 828 1746  
Get email, calendar, docs & more for your business - 30 days free!

**Accounting Software**  
www.sage.co.uk/Accounting\_Software  
Accounts & Support Only £5 a Month  
Free Trial & Money Back Guarantee!

**Best Accounts Package**  
www.emdit.co.uk/   
Popular PC Accounting System For Computerised Accounting Systems!

**Accountants - From accountants?**  
www.accountant-quotes.co.uk/   
The best accountants quotes - quick & easy

**Microsoft Dynamics GP**  
www.msdynamicsgp.co.uk/   
0800 996 1833  
Top rated accounting package.

# advertising

## Quality leads on tap with LinkedIn Ads

LinkedIn Ads enable you to generate website visitors and leads on tap. You can start the advertising process and stop it as often as you wish. You can also target your prospects carefully and start with a small budget.

A small investment of £200 or so will enable you to test a few initial ads. The great thing is, you can test lots of different variables. Each one affects your results either positively or negatively. In attempting to find 1 successful ad you will probably test 3 or 4 that don't perform.

## How does it all work?

LinkedIn ads appear in the right hand side of your page beneath 'People you might know'. Click on the drop down 'Advertise'. You may be asked to log in again, that's double security. Then you get the chance to do some important targeting.



## The Ad explained

4  **New App for Accountants 1**  
 Watch the short video to see the most powerful App for 2 accountants  
 3  
 Go To URL: <http://www.myfirmsapp.co.uk/free-dei>

### 1. Headline

It has to be short so use something punchy and catchy. Using the job title of the people you are targeting, in this case accountants, will increase response rates.

For you it could be something like this:

#### Ad variation 1

**Ad destination**

**Your web page**  
<http://YOUR WEBPAGE URL>

**A page on LinkedIn**

---

**Add Image** **Proactive Leeds Accountant**  
 Discover what a proactive accountant can offer during a free 1:1 review

**From:**  
 Other

Duplicate | Delete

+ Add a variation (Optional)

### 2. Ad Copy

The number of words are restricted by LinkedIn, so try to ensure the words are compelling enough to get your end users to click.

### 3. URL

Destination URL – this is the URL that you want visitors to go to. Do not simply send visitors to your Home page. This won't work, you will lose them. Send them to a landing page that's tailored to your message with a form to capture data/interest.

For basic tracking you can use a Bitly link here (see page 65)

### 4. An image/photo

Tip 1 | Tip 2 | Tip 3 | Tip 4

 **Tip:** An image can help your Ad draw more interest among your target audience. Ads with images get up to 20% more clicks.

FAQ »

Make sure the photo you use is both relevant to the ad and also engaging. Photos do make a big difference and are something worth testing.

### Testing different Ad variations

One of the fantastic things about LinkedIn ads is being able to split test different ad variations. Below are 4 genuine ads we ran, each one slightly different. You can clearly see the best performing ad with 92 clicks was the top one.

Ad	Status	Clicks
<b>Total for All Ad Variations</b>		<b>133</b>
 <b>New App for Accountants</b> Watch the short video to see the most powerful App for accountants Go To URL: <a href="http://www.myfirmsapp.co.uk/free-dei">http://www.myfirmsapp.co.uk/free-dei</a>	On	92
 <b>One Accountants App Story</b> Leading accountancy firm share their App journey and experiences here Go To URL: <a href="http://www.myfirmsapp.co.uk/tayabali">http://www.myfirmsapp.co.uk/tayabali</a>	On	20
 <b>Accountants App ! Demo</b> Thinking about an App? See the most powerful App for accountants free here Go To URL: <a href="http://www.myfirmsapp.co.uk/free-dei">http://www.myfirmsapp.co.uk/free-dei</a>	On	11
 <b>Accountants App Free Demo</b> App for accountants promoted by ICAS, ACCA, ICPA see it live free demo here Go To URL: <a href="http://www.myfirmsapp.co.uk/free-dei">http://www.myfirmsapp.co.uk/free-dei</a>	On	10
<b>Total for All Ad Variations</b>		<b>133</b>

# How to target your prospects

LinkedIn **won't work** if you don't carefully target your audience.

Fortunately, this is simple enough to do as LinkedIn ads enable you to target your audience precisely. Here are some of the basic profiling tools. If you wish to discuss more targeting options we can pick this up in your 1:1 Marketing Clinic see page 65.

Choose the location. Without this you will be targeting the entire world, as you become more geographically selective, you'll see the Audience number reduce.

The screenshot shows the 'Targeting' step of a LinkedIn ad campaign. The 'Who's the audience for this campaign?' section is visible. The 'Location' field is set to 'Please specify at least one location'. The 'Audience' box shows '200,000,000 LinkedIn Members'. The 'Companies' section has 'All' selected. The 'Job Title' section has 'All' selected. A 'More targeting options' link is visible at the bottom.

In this example we have narrowed the audience from worldwide to 'Birmingham' reducing the number of people your ad will appear in front of. That means your ads can be more specific and the response rate higher.

Your ad will now only appear to companies in Birmingham. However you can be even more selective.

The screenshot shows the 'Targeting' step with the 'Location' field set to 'Birmingham, United Kingdom'. The 'Audience' box now shows '269,071 LinkedIn Members'. The 'Location' box is expanded, showing a list of countries and regions, with 'Birmingham, United Kingdom' selected. The 'Companies' and 'Job Title' sections remain the same as in the previous screenshot.

You can target by company size. Most financial services firms work predominantly with a certain size of client. Typically this is 1 – 200 employees. So for this example, we have narrowed the geographic area to Birmingham and the company size to only display the ad to companies that fit this criteria. Reducing the total number of LinkedIn members this ad will appear to just 5,535.

The screenshot shows the 'Targeting' step with the 'Location' field set to 'Birmingham, United Kingdom'. The 'Audience' box now shows '5,535 LinkedIn Members'. The 'Companies' section has 'By category (industry, company size)' selected. The 'Company Size' dropdown is expanded, showing options for '1-10 employees', '11-50 employees', '51-200 employees', '201-500 employees', and '501-1,000 employees', with '1-10 employees', '11-50 employees', and '51-200 employees' selected. The 'Job Title' section remains the same.

## Setting your budget

Setting your budget on LinkedIn is also easy. We recommend setting your first test campaigns for a maximum of 1 week to ensure you don't spend too much, and also remember to review the results. In the example below, LinkedIn has suggested the minimum bid per click (someone who reads the ad and clicks on it) is 2 USD and we have set the daily limit to 60 USD. When we reach that limit it will stop for that day.

**How would you like to pay for this campaign?**

Pay when someone clicks on your ad - cost per click (CPC)  
Select a bid (max amount you're willing to pay when someone clicks)

Suggested bid range: 2.01 - 2.35 USD  
Minimum Bid: 2.00 USD  
Amount must equal or exceed minimum bid

Pay every time we show your ad - cost per 1,000 impressions

Suggested bid range: 2.14 - 2.26 USD  
Minimum Bid: 2.00 USD

**What's your budget for this campaign?**  
We'll show your update as often as possible until you reach this limit.

Daily  Daily budget must be at least 10.00 USD.  
Your campaign's actual daily spend may be up to 20% higher. [Learn more.](#)

**How long should we run your campaign?**

Indefinitely

Until

**Lead Collection:**  
Turn clicks into qualified leads with just one click, by giving your audience a single-button to ask to be contacted.

Turn on Lead Collection for this campaign. [Learn More](#)

## Measuring your results

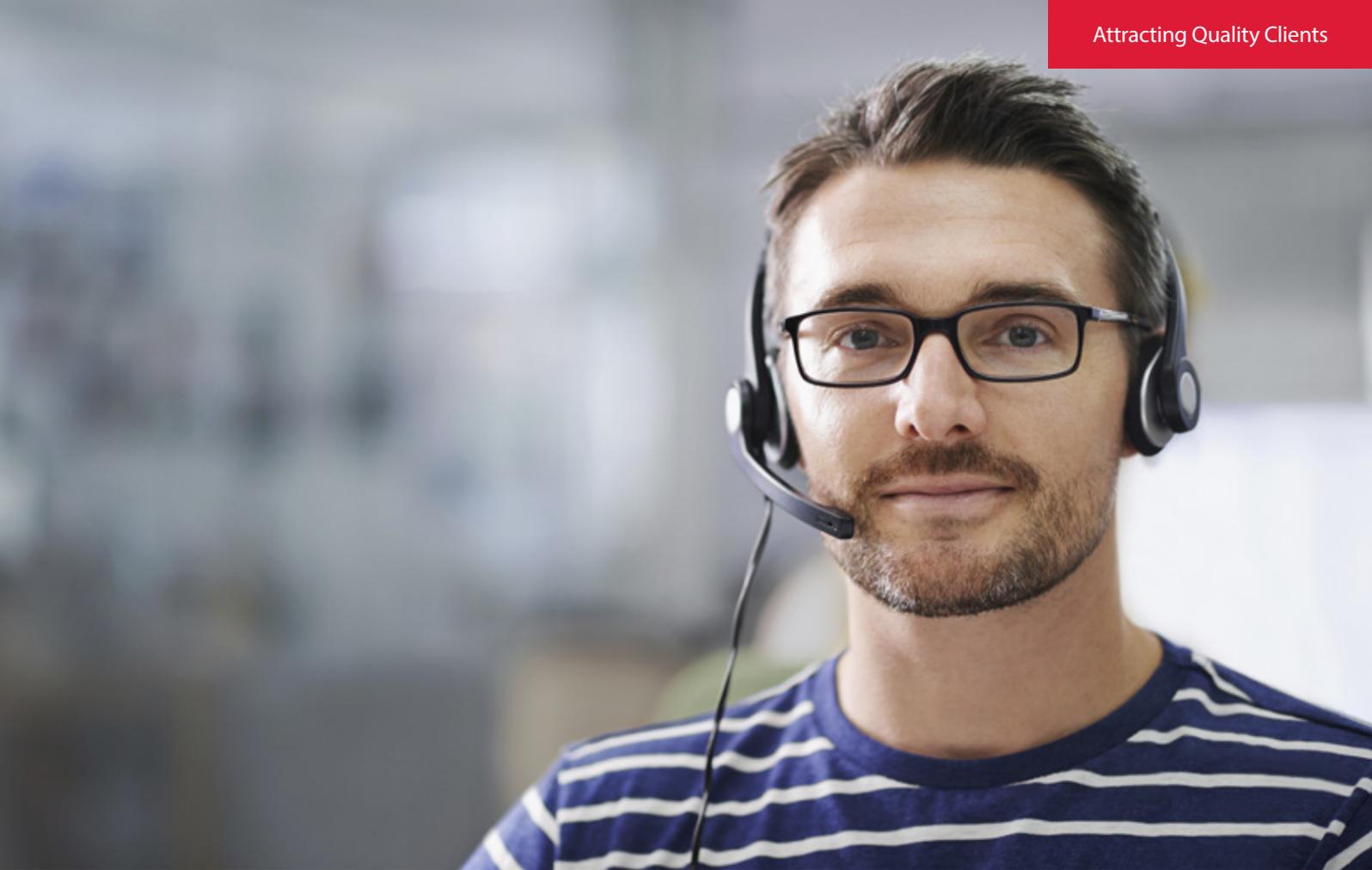
At the end of week one, log on to LinkedIn and see what your results look like. There are 3 ways to do this.

1. Through LinkedIn using their analytics which are nicely graphed for you.
2. Double check their stats against Bitly (if your URL was a Bitly link see page 65)
3. Your own landing page and Google Analytics (not covered in this report but something we can discuss in your free Marketing Clinic see page 65)



## TMAI – Test . Measure . Adapt . Improve

Message and targeting is king when it comes to LinkedIn ads. So if your first few attempts don't work, don't worry. That's perfectly normal. Some of our best campaigns have started off very badly. But we used these experiences to fine-tune the ads. Sometimes a simple change of image, title or a few words can make a difference of 50% or more.



## **Telemarketing, Appointment Generation, Cold Calling etc...**

If it is correctly set up, carried out and managed, telemarketing remains one of the most proven, reliable and profitable ways to win high quality new clients for professional service firms. Equally, the margin for error is small and that means it is very easy to get things terribly wrong.

We sincerely hope that this section will encourage some firms to investigate telemarketing further, particularly when it's undertaken by industry experts such as Insight. However, it may deter others from telemarketing completely and encourage them to consider other forms of marketing which are more appropriate to their business.

## Expectations and Goals

Setting up a telemarketing campaign should never be viewed as a 'quick fix' or be looked upon as being easy. It isn't! Instead, accept that you are in it for the long haul, set aside the money to fund it over that time-frame and make sure you review the results regularly with a view to improving it as the campaign progresses.

Without question, telemarketing does work for professional service firms - but before you embark on a pilot or a test, please make sure you have done your calculations correctly, carefully and with reasonable caution.

And don't expect instant results. If you were to speak to one of our team they would explain that you may not see a return on your investment of money into your bank account for 12 months or more into a campaign. This sales lag is very common when selling for professional service companies.

If you consider it logically, our model (and most others) works on a per-day telemarketing session and it normally takes between 6 – 10 sessions to get a telemarketing campaign up and running from cold. Therefore, it's unlikely that appointments will be regularly booked until week 6 or 7 of the campaign.

Depending on your own experience of carrying out appointments, your confidence levels and the amount of training you have received, it will probably take you 2 or more visits to win the business. Our own research over 35 years shows it takes an average of 7 contacts to get a potential customer to become a current client. This may well be a combination of face-to-face visits, emails, letters etc, but what is clear is that it is very unusual to pick up the business at the first opportunity.

This time or sales lag – and the corresponding cash flow lag - must be factored into the process. There are many reasons why campaigns might not work, but before you start, make sure you have set aside enough cash to stick with the programme long enough to see the results start to flow through.

## The right model for your firm

Most professional firms should outsource the telemarketing role. When doing so there are typically 3 telemarketing models you could pick from:

### Commission Only

You appoint a telemarketing agency to generate appointments/leads on your behalf and only pay them for each appointment/lead generated.

For many firms this looks like the most desirable model, and why not? After all, there is absolutely no risk! All you have to do is go to the appointment and close the deal.

And it can work. There are specific circumstances where this approach can work well. Typically, this model is great if you are selling a low value, high volume service. Where the telemarketing agency can effectively 'cold call' any type of lead and book an appointment. We have seen it work well for accountancy firms for example, who are offering low cost services sub £500 per annum.

### Beware of the hidden risks.

However, on more occasions than we would care to mention, we have seen these campaigns fail. The hidden risk is key staff time both managing the project and attending the appointments. It can swallow hour after hour, meeting poor quality prospects; attending meetings where nobody is there or worse have been 'persuaded' into meeting you.

And if you've only previously experienced referral-type appointments, then you might think of yourself as a super closer, converting almost every appointment into a happy paying customer.

Cold appointments are as different as night and day to referral-type meetings, and appointments booked using a commission-only model are likely to be the very coldest of all. After all, if the company you appoint only charge when a lead is generated, how do you think their staff are motivated? By quality or quantity?

***We don't provide nor recommend a commission-only model or company.***

## Part Payment – Part Commission

This is where you appoint an agency and pay part per session or per day and part commission, either when an appointment is booked or has been successfully closed.

This is a more balanced risk than the commission-only model as it enables you to control the quality of what is produced. It helps you reign in poor quality appointments and only pay for those that meet pre-agreed criteria.

While we do not offer this service, there is one UK company we recommend very highly and can discuss their model with you, if you wish.

### The potential disadvantages of this model can be:

- Administration and tracking of payments – can be immensely time consuming and become rather difficult if you and your supplier disagree.
- Commissions on sale values can be more than you would pay using other models
- It's almost impossible to use this model and exclusively focus on high value clients (those spending £4,000+ per annum)

## Pay per day – no commission puts you in the driving seat

This is the model we operate, because in our view it's the perfect one to use when targeting hand-picked, high value clients. Our team is in high demand and they are only used to identify clients spending significant fees per annum.

We don't charge any commission, instead we charge £495 per day. During this day we only target potential customers who meet the criteria we have agreed together. What's more, our team are neither interested in nor motivated by generating volumes of appointments. Instead, they develop a relationship with a prospect until they are ready to buy. This means our clients enjoy a healthy conversion rate from appointment to client and a great ROI on their investment with us because the clients they win are all high value.

The potential disadvantage of this model is that the financial risk is entirely in the hands of our customers.

## Lead Generation for Accountants – will it work for your firm?

We have a lead generation solution for all accountancy firms. That's why we insist upon starting with you're your free marketing clinic. During your free 1:1 call we will find out exactly what types of new customers you are looking for, and your plans for growth. We can discuss together what's worked for you in the past, and what hasn't. Along with your hopes and expectations for the coming 12 – 36 months.

During your call we will share with you results from campaigns working for firms just like yours. Plus one or two ideas you can implement yourself for short term wins.



## HOW TO GROW YOUR FIRM

Without working harder or longer

Free webinar for report readers

### Lets call it how it really is!

Most accountancy firms want new clients, to raise billable hours and grow.

It's just a question of how! How can you find these new clients in the right volume for your practice?

Too many and that's a bad thing, not enough and you're left just treading water, and they've got to be the right type of clients for your business. So what is the right type of client for you? It normally means a blend of elements such as spend, industry, personality type and expectations.



### The Ace of Spades!

If you want to grow – then the timing for this special email is perfect and what I am about to reveal is the 'Ace of Spades'. No need to spend the next 12 months digging around, trying to find what works and paying handsomely for what doesn't!

### 45 Minutes of down to earth and honest practice growth content

You can join us for this special webinar that explores how to grow your firm, raise your billable hours all without working harder or longer – just implement what we know works for others and leverage the things you are already doing. For dates and details simply scan the QR – call us on 01325 469603 or visit our website.





# TRAFFIC CONVERSION

## How to convert visitors into enquiries

It might sound a little odd, but almost all the people visiting your website will not be ready to buy from you or enquire at the time of visiting. Over the next few pages, we'll explore how you can ensure that your website is equipped to develop inbound leads.

*"We've just met. Will you marry me?"*



**96% of your website visitors are not ready to buy or enquire.**

 **KISSmetrics**

## The number 1 mistake professional firms make online

90% or more of your current, website visitors are not ready to make an enquiry when they visit your website. So if you're not catering for them, then you are losing the bulk of your website visitors. During a recent webinar, our team pre-tested every delegate firm's website. Over 90% of these delegates had no compelling 'soft' offer on their website.

Let's put that another way... Over 90% of the professional firms that attended our webinar on this topic were missing out on 90% of their website visitors.

### Do you have multiple calls to action?

A call to action (CTA) is something compelling, engaging and free (like this report). It should be available either instantly or within a few moments and should be perceived as highly valuable to your website visitor, in exchange for basic visitor data.

This report is a good example. It took hours to write, days to design and pull together, thousands of pounds to complete and then we give it away! No charge, no strings attached. . . . Madness perhaps, but in exchange for giving away this material we are able to:

1. Gain your data data
2. Start or develop a relationship with you
3. Not lose you as a client – remember over 90% of our website visitors are not ready to buy
4. Impress you (we hope) – with the quality of the download and the material it contains
5. Win you over either in the short or long term

### These are not strong calls to action



Register or Login for free resources

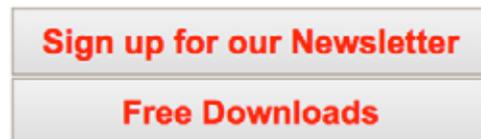
Username or e-mail: \* \*

Password: \*

[Log in](#)

[Create new account](#) [Request new password](#)

By logging in you are agreeing to accept [cookies](#) on your machine and accept this website's [terms and conditions](#)



Here are some better examples

The collage features five distinct website examples:

- Top Left: Nordens** - A professional website for Chartered Accountants & Strategic Business Advisers. It features a clear navigation menu on the left, a prominent mobile app promotion banner, and a 'Login to N-Books' button. A 'NEWSLETTER' sign-up is also visible.
- Top Right: Accountancy Firm** - A vertical sidebar with two circular award logos from ICAEW and a 'Learn More' button.
- Middle: Accountants & Legal** - A website with a focus on value-added services. It includes a navigation bar with categories like Philosophy, Accounts, Legal, Tax, Blog, and Contact us. A central banner asks 'Have you ever met an accountant who could see beyond the balance sheet?' and features an 'INSTANT QUOTE INTERACTIVE' badge and a 'Find out about our Accounting Services' button.
- Bottom Left: WOW** - A website for accountants targeting small businesses. The headline reads 'Make More Profit, Pay Less Tax, Have More Fun'. It includes a navigation bar and a decorative banner for 'Proactive accountants from £99 a month'.
- Bottom Right: CaplanAssociates** - A website offering a 'Free £200 Voucher' to new clients. The main headline is 'Save money With our free £200 voucher'. A detailed voucher card lists services like 'Starting up in business', 'Developing your business', and 'Planning to exit your business'.

# So what can you offer visitors when they first arrive at your site?

If you give it some creative thought I'm sure there are many 'soft' offers you could give to your website visitors.

Here are just a few examples.



## A free App

One of the benefits to launching your own App is that it makes a fantastic 'soft' offer for your website. You can choose to let them download it direct without a landing page knowing you will contact them via the App and push notifications or get them to sign up for the App first.

## A free guide, report or even a comic

Here is a small selection of examples:

Greenstones offer visitors a free tax comic.

Another firm offers a Tax Savings book.

Another one has a free Tax Tips PDF



### Free 21 Tax Saving Tips pdf

Sign up to our tax newsletter and receive your free copy of our 21 Tax Saving Tips pdf.



## A voucher for your services

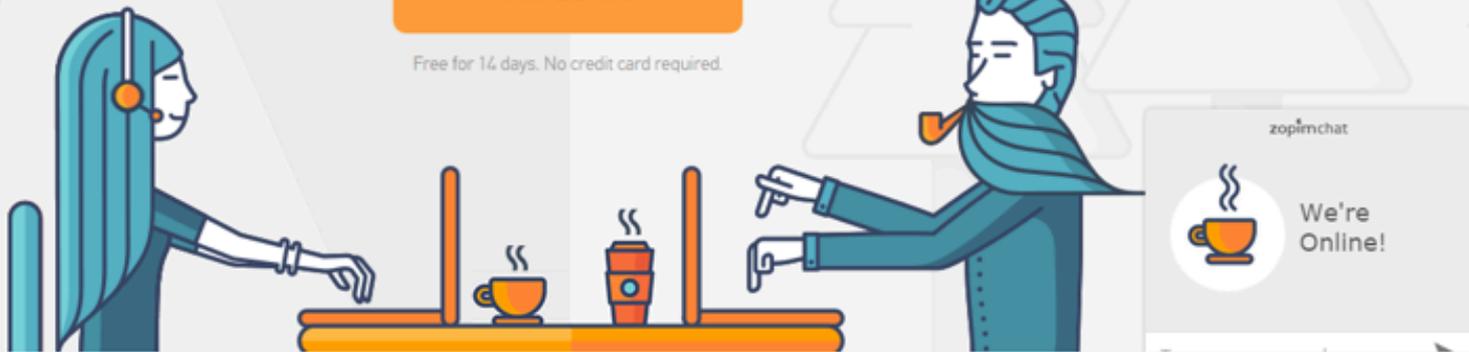
Another simple but highly valued offer is to give your visitors a free voucher. It's a spin on a free meeting but it places a specific value on your time. Of course, you can vary the amount, the details on the voucher etc. The appointments generated from this type of offer are frequently good quality, because the reader can see immediate future savings when they use the voucher.

## Talk to your customers in real-time

Live chat is a faster and more personal way for you to engage your customers.

TRY ZOPIM

Free for 14 days. No credit card required.



View more at: [85ideas.com](http://85ideas.com)

### Live, real-time website chat facility

Talking to your website visitors is an amazing way to help convert visitors to clients whilst improving current customer care.

Installing the facility onto your website is either a no-cost or low-cost exercise and once installed its easy to manage thanks to the very latest technology.

# A simple, highly effective engagement tool

Once it's setup on your website you can either use a free edition or a paid for version. The paid for version enables you to set up a series of automatic messages. These seem to come from you to the visitor and provoke or encourage them to engage.

These can be set per page. Let's imagine some is viewing the 'personal tax' page on your website. The message could automatically appear: 'Hi there, I can see you are reading about personal tax returns. Is there anything we can help you with?'

This message could appear at a time you set, say 10 seconds after the visitor has landed on the page. And once they reply, it enables you to directly communicate with them, help them, and convert them to an enquiry.

We use Zopim but there are many other alternative providers should you wish to explore them.

**My Firms App Ltd**  
UK 01328 489503  
AU 0283 155483

Home | About | Accountants & Bookkeepers | Australia | America | Add-On Modules | Contact & Support | [Free Test Drive](#)

## Apps for Accountants & Bookkeepers

The leading supplier of approved Apps for Accountants and Bookkeepers around the world.

**Free – Full Feature Trial**  
Discover why 100,000+ end users love this App

### Apps for Accountants and Bookkeepers

The world that we all operate in has changed, and having your own App is now one of the most powerful ways your firm can:

- ✓ Protect your customers
- ✓ Save time and money
- ✓ Differentiate your firm
- ✓ Integrate your systems
- ✓ Generate referrals
- ✓ Market your firm

Launching your App using MyFirmsApp will help you build deeper, more valuable relationships between your business and your customers. Providing a powerful solution with multiple opportunities to engage using approved tools, features and content.

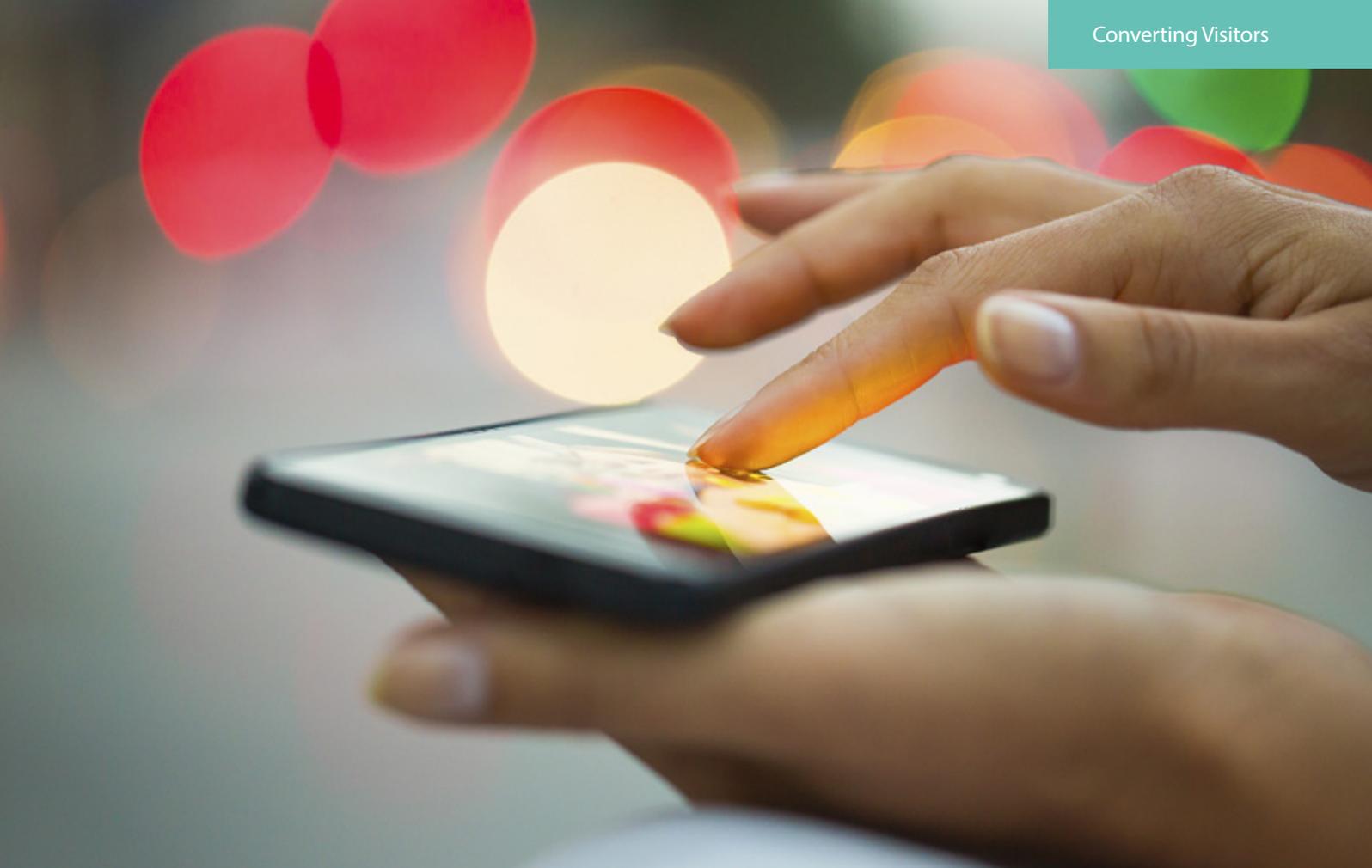
Trusted by over 100,000 end users, loved by clients, endorsed by industry leaders

#### Comments from 3 accountancy firms

- The App makes us different
- Everything is now in one place
- Extremely Impressed

Questions or Help? [Click here to start a chat](#)

Online - Chat with us



## Mobile Websites

This report focuses on lead generation and marketing tips for professional services firms. You may think that 'mobile' is an interesting topic that can be considered sometime in the future. Far from it! Mobile is very much the here and now and it's already having considerable influence on everything we do now and in the future.

So how should professional services firms respond when it comes to their online presence?

### Important statistics

- Over **50%** of local searches are carried out on a mobile. That's over 50% of your potential clients, the people you want as clients, using a mobile device to search.
- **94%** of accountancy firms do not have a mobile-enabled website
- In **2014** mobile internet use will overtake desktop use
- Tablet sales are set to increase by **70%** in 2014
- PC sales are seeing the biggest decline **in their history**
- A visitor is **67%** more likely to buy or enquire from you using a mobile website

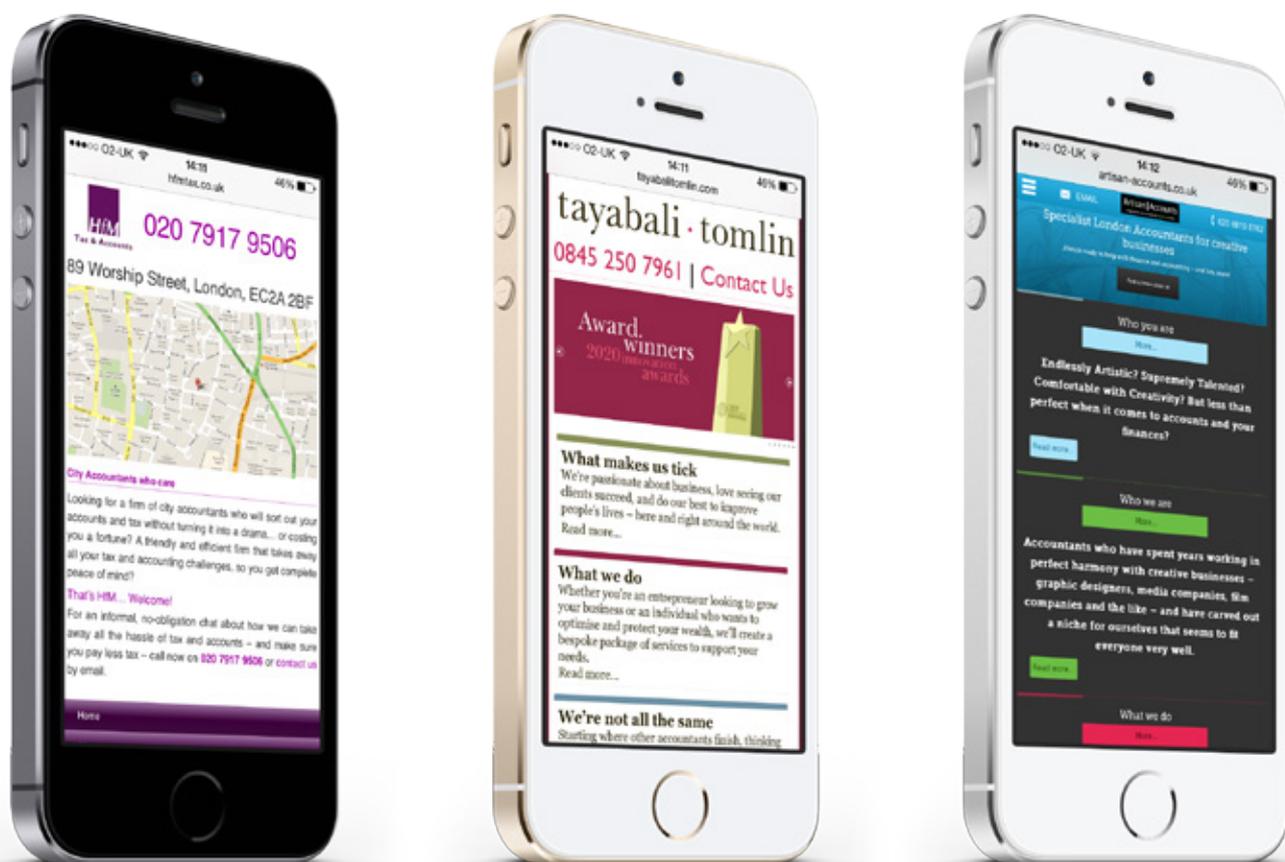
### Getting Mobile sorted is very easy

There seems to be a lot of confusion around mobile websites and there doesn't need to be. In most cases they are simple to achieve, low cost and hassle free. But the benefits are significant.

## Advantages of a mobile website

- Rapid load time
- Directions and contact info immediately available
- Key content instantly available
- Minimal scroll, pinch or zoom
- Simple, easy to read navigation
- Click to telephone call
- Mobile forms

## Here are 3 examples of mobile sites our team have created

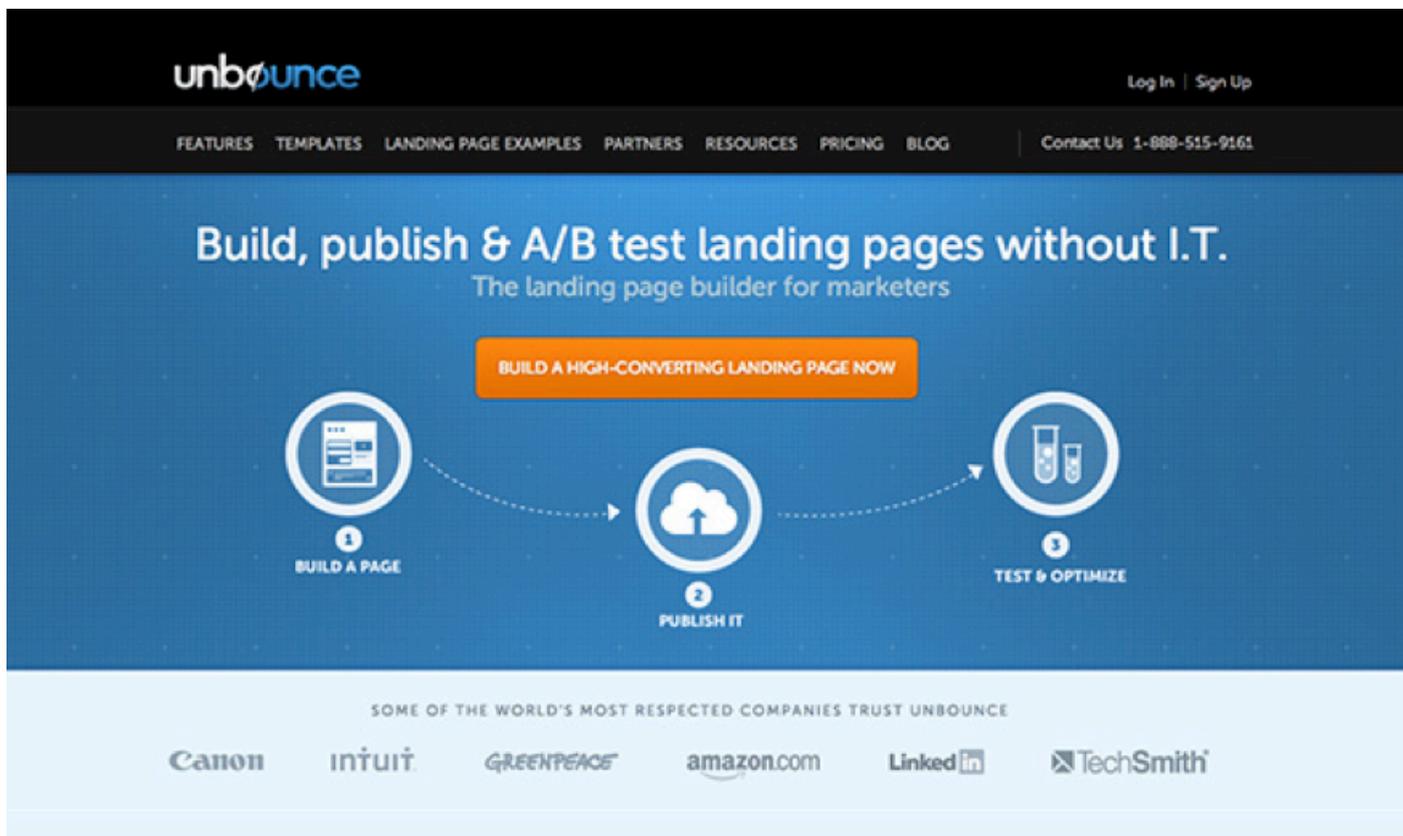




## Landing Pages

In the purest sense, a landing page is any web page that a visitor can arrive at or “land” on. However, when discussing landing pages within the realm of marketing and advertising, it’s more common to refer to a landing page as being **a stand-alone web page distinct from your main website** that has been designed for a single focused objective.

This means that your landing page should have no global navigation to tie it to your primary website. The main reason for this is to limit the options available to your visitors, helping to **guide them toward your intended conversion goal**.



## Creating landing pages for ultra high conversion rates

As the previous pages have indicated, getting website traffic is not enough. What a successful marketer must also achieve is a high conversion rate from visitor to enquiry. You can try and do this using your primary website but this is often highly complicated, restrictive and difficult.

Most of the businesses we work with don't have control over their existing website so they can build landing pages themselves. And even the few who do, would face a range of conflicting issues trying to make a landing page fit into an existing website design.

And that's why we often recommend using a stand-alone landing page for each significant campaign. This enables you to create the page with the sole focus of converting the traffic you send to it. There are a variety of platforms available that enable you to build your own page, publish it and then test and optimize the page. We use 'Unbounce'. It's the best platform for our needs and it's the system we used to offer you this free report.

### This free report as an example

We developed landing pages using the **Unbounce** system

Sent out emails offering the free report – using a combination of plain text and html emails – directing traffic to the landing page.

Sent out blog articles about the free report – directing traffic to the landing page

Data is grouped on our CRM system

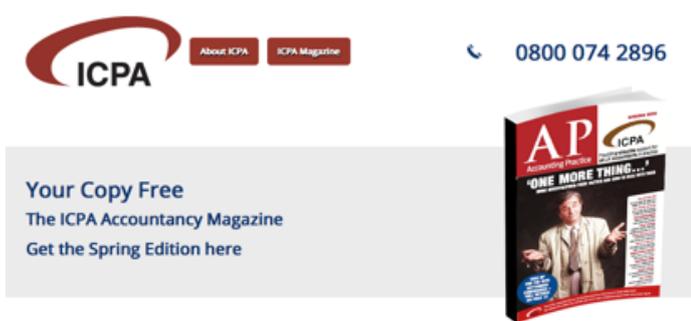
Our team will take it offline, call you and arrange your free 1:1 marketing review

## Microsites as landing pages

There is another way you can approach landing pages. Rather than use a page building system, you can create a specific microsite.

We have taken this approach when working with The ICPA to help engage with more members. Rather than direct traffic to their primary website, we created a small microsite. The site on [www.theicpa.co.uk](http://www.theicpa.co.uk) offers visitors a free copy of the latest ICPA magazine or a chance to find out a little more about the ICPA.

It generates a very high conversion rate from visitors to downloads and hundreds of requests for the magazine.



### What is ICPA?

It's an organisation that has the needs of small practitioners at its core. ICPA (Independent Certified Practising Accountants) has been around for more than 10 years and is now considered by many GP accountants across the UK to be the 'go-to' source for information, ideas, tips and tactics.

Unlike many of the other institutes and professional organisations which – forgive me for being blunt about this – don't seem to give a damn once you've become a member, ICPA is passionate about the wants and needs of its members.

If you've got a problem with tax or VAT, money laundering or PI insurance or even what type of water dispenser to put in your office, just ask ICPA and we'll take you straight to the answer. Try asking the same questions to some of the most prestigious professional bodies in the world and you'd struggle to get an answer!

How can ICPA keep its finger on the pulse of what practising accountants need? Simple – because everyone involved in the management of the organisation is a practising accountant. We know what our members want and need, because we want and need them ourselves.

To find out more please contact me, Tony Margaritelli on **0800 074 2896** or email me via [tony@icpa.org.uk](mailto:tony@icpa.org.uk)

### Get your free Report

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### Discover inside your free guide the very latest Tax and VAT news

It's always nice to receive something for nothing, isn't it? Especially when it's a highly relevant free report on Tax and VAT issues that's bang up to date. And there's no reason to be suspicious, either. There are no strings attached. It's simply a gift from me to you.

To download the guide simply fill in the form and immediately access your free 24 page report.

If you'd like to speak to me personally you can call: **0800 074 2896** or email me via [tony@icpa.org.uk](mailto:tony@icpa.org.uk)

Best regards,

*T. Margaritelli*

Tony Margaritelli | Chairman | ICPA.org.uk

### Get your free Report

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Email address: \*

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## PUSH NOTIFICATIONS



## PULL IN MORE BUSINESS

### **An immensely powerful communication tool**

Although the technology they use is 'cutting edge', the way Apps work is not difficult to understand. It doesn't take a great deal of 'getting'. Mobile Apps are the most affordable, effective and productive tool to help you reach and interact with existing and future customers. Never before has it been possible to be so close to your clients and prospects 100% of the time.

Push notifications are the voice of your App, they are easy to write, take seconds to send, can be pre-scheduled and generate a far higher open rate than emails. That means the next time you want to send your clients and prospects a message, you can do it all in less than a minute, and you know it's going to be read. Whether it's a reminder about year-end or important budget information, you know they will read it.

## How to write successful Push Notifications

If you are ready to start writing, then here is our short guide to writing great Push Notifications. They are relatively new; so there is little written about best practice in relation to Push Notifications. Here are our latest tips to writing great push messages. Many of the skills and experience built up using different forms of marketing are applicable here, so if you are used to sending emails and working hard to get your subject lines right, this will really help you when attempting to craft your first few push messages.

### This Time It's Personal

A Smartphone or tablet is a personal item; most people carry it from the boardroom to the bedroom. In fact, it's never been possible to get this close to all your contacts, 24/7. So don't abuse this and remember it when you are considering sending push messages.

Unlike an email that comes to your phone or smart device, where the user has the option to open their mailbox or not, a push message arrives directly onto the screen with only two options – Close or Open.

So avoid sending a message out during unsociable hours; keep the frequency to a maximum of 1 per week and keep it professional. There are many examples online of bad Push Notifications, so please don't make these common mistakes.

Equally, try and get the timing right. Send your messages at times when your end users are most likely to want to receive them. Consider sending them first thing in the working day, at lunchtime or look at your analytics and see when you already get the most traffic on your App. Focus your Push Notifications on times when users are likely to be using your App to maximise the response rates.

### Length of message by device type: Keep it Short and Sweet

Android allow 40 characters - Apple allow 140 characters. Think of a push message as a Twitter update crossed with an email subject line. You don't have the luxury of space; you must get to the point straight away. Your end users will scan the message in seconds before taking action to open or ignore.

### Test Measure Adapt and Improve – TMAI

All forms of marketing and promotion is measurable, and that includes Push Notifications.

So when our team are consulting or running campaigns, we work with a simple but unique process called TMAI ©. Test, Measure, Adapt, Improve – which incorporates a continuous process of testing new things, new approaches, new data, new routes to market, new messages. Each time, every new result allows us to measure and compare the figures so we can refine and improve each lead source.

This consistent 'fine-tuning' makes the difference between a mediocre campaign and an exceptional one. So test different things with your push messages; long titles, short, direct and indirect etc.

i. Don't assume the results will stay the same for ever. One of the key characteristics of the profession and marketing is constant change.

ii. Test multiple things, focusing on the things that work.

iii. Measure the results

### Think about your audience. It's about them, not you, so make it relevant

The message should always aim to get customers interacting with your App. It could be an up and coming event, a legal change or budget change, or perhaps a wealth alert from an IFA or IFP.

Ideally, the Push Notification should be about something that your end users can do within the App. Whether that's looking at your latest blog article, using a calculator or mileage tracker

### Direct your user: think 'Call To Action'

Don't leave it for your App user to work out what you want them to do. Tell them, using a Call To Action. For example, 'Check out the latest legal news in the blog section' or 'Open the calculators in App to see the latest additions including Salary Versus Dividend'. If you don't give your users a Call To Action then your notification is likely to be ignored.

# bitly

Save, share & discover links

[Learn more](#)

## Track your links for free using bitly

*A 'free' way to track results and shorten links*

(We love Bitly! It works, it's Free and it's Awesome!)

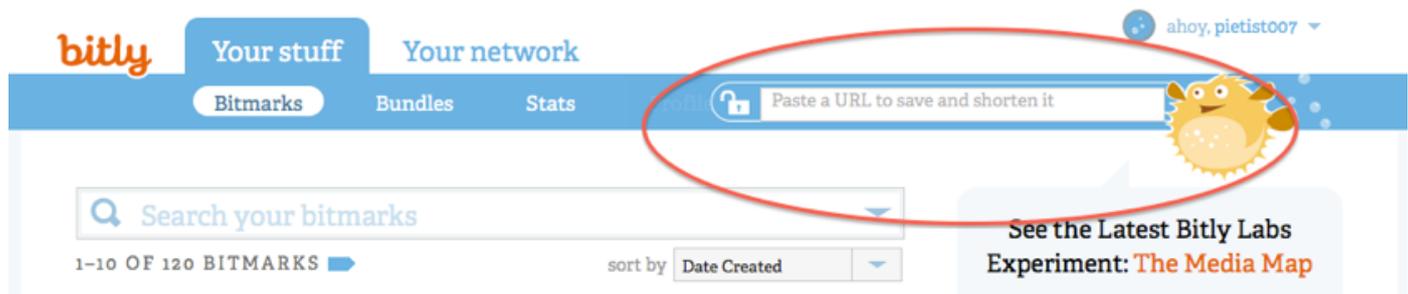
## Tracking results and sharing shortened links

There are times when you might want to track how many people have clicked on your link (website URL). Perhaps a link you have shared in a status update or used on your LinkedIn ads. You might also want to shorten a link, for example, when using Twitter. Bitly will do this for you – and it's all free.

### How does it work?

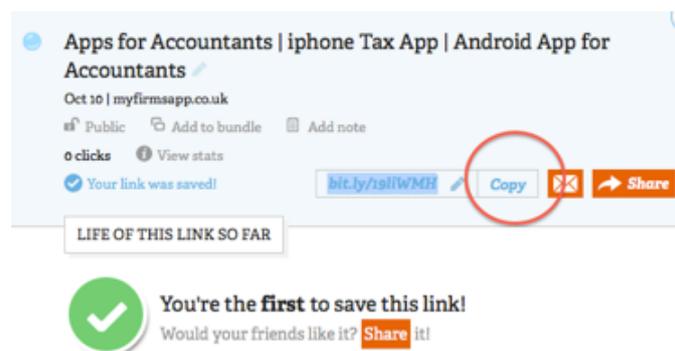
Just visit [www.bitly.com](http://www.bitly.com) and set up a free account with them. You don't need a credit card - it's not a free trial. It's a genuine free service.

Once your account has been set up, simply enter the link (website URL) you wish to track and shorten in the box at the top of the page.



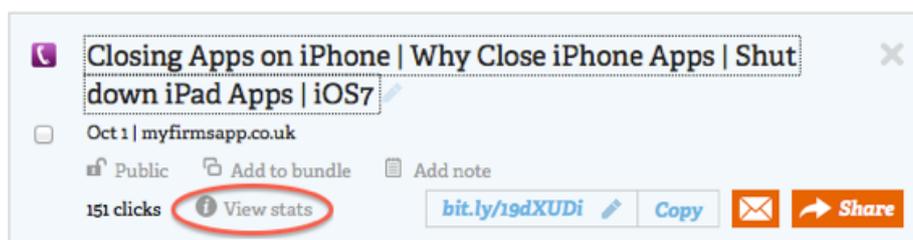
A new box will now automatically come up on screen – showing the page title and link (website URL) you are sharing. This example is Apps for Accountants and the link is [myfirmsapp.co.uk](http://myfirmsapp.co.uk)

To share the Bitly link, click Copy and then paste it into LinkedIn, Twitter or wherever you wish to share it.



### Simple, reliable, tracking

To see how many users have clicked on your link, simply log in to Bitly and see your shared link (in this example is Closing Apps on iPhones) and click the 'View Stats' button. You will then be able to view all the stats for that link.





## Take the conversation offline and close

Let's look at some 'rock solid' foundations that are key to your lead generation strategies.

### Take it offline ASAP

A balanced approach to lead generation is one that will generate reliable results that you can predict and base your future growth upon. It means we are often cautious of bold or brash statements.

So when we suggest you should take it offline ASAP, that's a counter-cultural statement that requires an explanation.

So here it is . . . . .

### **You will only generate an ROI when you take the conversation offline.**

Despite what many digital 'gurus' might suggest, we believe that those in the accounting and financial services professions will only make a positive ROI when they take a conversation offline... That means physically talking to a person and meeting with them.

No volume of email auto responders, LinkedIn posts or tweets in 'The Cloud' will change this for those selling a professional service like accountancy, financial planning or financial advice. All these other elements are important to generate leads, but to generate a sale; the conversation must be taken offline.

### What does that mean?

What it means is that successful lead generation must have personal telephone follow-up 'built in' to respond to each and every contact/opportunity/lead generated online and offline.

Typically, a firm will either have a dedicated, internal person who can respond in a professional, timely manner to these opportunities or choose to outsource this responsibility to a competent third party. Our team of lead generation specialists are often used in this way to discuss a current campaign. Please register for your 1:1 consultation.



## Make the most of the leads and opportunities you have

### ***No more poor proposals!***

This is not about generating more leads, it's about making best use of the leads you have. A great proposal is one of the hidden, yet very real contributors to great conversion rates. Yet many of the proposals we see are sub-standard.

And that's a real shame, after so much work and effort has gone into generating a lead and then an appointment. To blow it by sending a boring, dull proposal that simply lists what you do and the price, is such a waste of effort!

# What makes a poor proposal?

A poor proposal fails to capture what was discussed during the meeting, and provides no real direction in terms of what you want the reader to do. Many of the proposals we have reviewed have been constructed in a way that looks like a preface to a solicitor's contract! Almost all we have seen have been badly laid out and use horrible typefaces. They appear to be a template, lacking any thought for the potential customer, and offering the reader no reason to go to the trouble of changing their professional advisor or appointing you.

## What reaction does your proposal create?

Here's an example of a genuine proposal from a firm of accountants but it could apply equally to solicitors or other financial service businesses.

"Dear Prospect

|||||

Accounts for the period ended 31 March 2014

It was a pleasure to meet you on Monday and I trust you found our meeting useful. I have now had a chance to review |||||, and I would like to thank you for giving us the opportunity to ||||| for our services.

To avoid any misunderstanding, this ||||| defines the services ABC Accountants will perform for you for the year ended 31 March 2014.

|||||

Your ||||| in our services will be ||||| plus VAT (||||| VAT per month)

For this ||||| we will:

- Prepare the statutory financial statements
- Audit those statutory financial statements
- Prepare abbreviated financial statements for submission to Companies House
- Deal with all business tax matters, including preparing corporation tax computation and preparing and submitting your Corporation Tax Self-Assessment return to HM revenue & Customs
- Deal with correspondence from the Inland Revenue

## Can you spot the problem?

1. Here's the initial problem... First, the main focus is the cost. Cost is the language, and it's even got the words 'quote', 'fixed fee', and the numbers all on the first page.
2. Second, it's all about the accountants and the legal obligations of the service and it's missing the client's needs, mood and desire altogether. This is the type of material we cover during our live events, however in this report we want to give you some quick fix ideas you can take away and implement.

## A misguided start!

Many of the proposals our team are asked to review are not proposals at all. It's a common misunderstanding. What some call a proposal is in fact an agreement or worse, a standard 'quote'. The language used is that of a legal order, 'fixed price contract' or 'fee quote', the layout and detail is that of an agreement. It often contains standardised bullet point lists like the following:

- Prepare the statutory financial statements
- Audit those statutory financial statements
- Prepare abbreviated financial statements for submission to Companies House
- Deal with all business tax matters, including preparing corporation tax computation and preparing and submitting your corporation tax Self-Assessment return to HMRC
- Deal with correspondence from HMRC

Perhaps worse still, some talk about fee protection, money laundering, fee analysis, fee menus, agreements, standing order forms and more. These agreements are boring, dull and totally uninspiring and at their most devastating they run the risk of frightening the prospect.

They fail to capture what was discussed during the meeting, and have no real direction in terms of what you want the reader to do. They do not capture the **mood, need, desire or heart** of the opportunity. If they achieve anything it's a focus on price and terms, and straight away you are providing the few interested prospects you still have with a negotiation focus - and that's exactly where they will start!

In real terms then, the document achieves nothing and a week later, you are left chasing up this poorly conceived document, in the vain hope your prospect might have read it, seen the price and said, 'OK'. Most decision-makers will roll their eyes as they thumb through the thoughtless text, which only reinforces their view that accountants are boring. If you are going to embark on a telemarketing programme with a view to winning new clients, then the strength of your proposal document is paramount.

## Writing a proposal not an agreement

The adopted process for most professional firms seems to be as follows:

- Attend an appointment with a prospective customer
- Send a standard agreement letter with quote
- Leave this with the customer for a while before chasing
- Gently chase once or twice
- No response or reply normally taken as a sign of no interest
- You feel rejected
- Customer has missed an opportunity to work with a better firm and save tax



**There are two** important rules which must be followed – even an excellent proposal will not achieve what you could not achieve face to face. It can however undo what you may have achieved in a face-to-face meeting.

1. Ask the prospect what their preference and expectation of the proposal is. Do they want a one-page document or a full 20-page paper with a detailed analysis? If they are too busy, offer perhaps a PowerPoint presentation that you can show at a return meeting.
2. The reason to write a proposal is to explain the problem/need/requirement that the prospect has, how you offer the very best solution, what the benefits will be once they use you, the investment required, how they can pay, testimonials and case studies and a clear next step.

### **Never, ever, post a proposal**

Always arrange a second meeting to see the prospect face to face. In the current market, decision-makers are fearful and often take longer to make decisions. Changing firms is an important business decision.

It is strategic, and not a decision anyone should make lightly. From your side, it's fair to assume that winning a new customer will require several visits and multiple communications from you before they change firm. Therefore, at the very least, in the first meeting, arrange the next face-to-face meeting. You will be amazed how simple this may be!

Simply explain you would love the opportunity to work with them, therefore can you arrange a meeting to take them through a detailed quotation? There are hundreds of reasons why a posted proposal may not get read, misunderstood or simply not liked. So don't leave it to the luck of the draw – adopt a new approach and make sure while you are in the first meeting that you arrange the next one.

### **Where to start when you write a proposal**

Our copywriting team have been used by many firms to review and subsequently re-write proposals. Some of these newly crafted proposals have been instrumental in winning very significant fees. Despite doing this day-in, day-out when writing a proposal, our team refer to a simple acronym to help focus each word.







## Conviction And Believability

People in the buying environment are tired of hype: at best they will be sceptical. So how do we retain conviction or believability?

1. Quantify wherever you can, with small amounts of interesting and compelling facts, figures, amounts and savings.
2. Quote genuine, convincing case stories or client comments.
3. Avoid servile phrases such as 'We beg to inform you'.
4. Avoid exaggerated claims or superlative words like 'fantastic', 'wonderful', 'brilliant', 'marvellous'.
5. Write conversationally - just how you speak. Confidence cannot be built on words or concepts that sound 'over the top' or appear untrustworthy. The written word can be believed more readily than the spoken word - which is another reason for keeping the letter believable.

## Desire

When he gets to the end of your letter, the prospect should be thinking, 'This firm is a good find', or 'This solution, with business development, tax savings and a service guarantee, is obviously right for me'. It should affirm the feeling of rightness, which our prospect should have towards you.

## Action

This is crucial and many people get it wrong. In most cases you should be at a stage in the relationship where you follow the golden rule of, 'Always maintain the initiative'. What we mean is that you determine the next course of action, not the prospect. You need to restate it in the letter, to nudge the sale forward one step. It is a commitment. It forces you to DO the agreed action, and makes it very easy for you to call back, when you said you would.

The majority of letters will state the action you are taking. Never end a letter by saying, 'Please let me know if you require further information', or 'We look forward to hearing from you'. That is the cardinal sin of letter writing. Instead, write, 'I will telephone you again on the 24th of June'. This leaves the door open and gives you the unspoken right to go back to the prospect.



## **Impress your existing clients**

For most professional service businesses many clients are won through word of mouth and recommendation. Therefore, impressing your existing clients is key to any long-term plan for growth.

Fortunately there are many ways you can impress your existing clients from giving them an App, to a customer survey to ensure they are happy, transactional feedback tools etc.



## **Your existing clients... are under attack like never before**

Before we look at clients as a potential source of A-grade leads, it's worth noting that over the next 12 -24 months your customer base will be under attack from your competitors more than ever before.

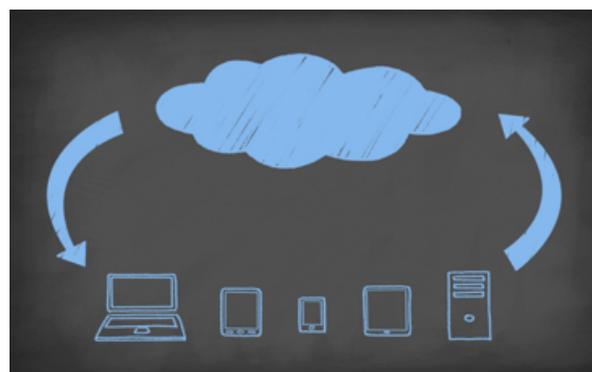
Some readers will be old enough to remember when almost all forms of marketing for accountants and other professional services were banned! Of course, those times are long gone and today it's an essential part of business survival to market your firm and its services.

## Where from?

The competitive threat is already here, as this report itself highlights. The channels being used are the most diverse and technologically advanced in living history! Traditional barriers can be broken down through social networking sites. Small, local firms can gain a national presence at the touch of a few buttons.

We've also seen a rise in the number of 'franchise' or 'overseas' type firms growing under the rather sexy veil of 'Cloud Computing'.

As the walls come down, we anticipate increased competition and pressure. It might come from a supermarket, a mobile phone provider or a bank. But as technology simplifies many professional advisory functions, the market is likely to be wide open for a seismic shift.



## Protect your clients by generating leads

Generating new leads via your App, website, email marketing and other routes can work extremely well. But don't miss the chance to tap into a goldmine that almost every practice sits on - their own customer base.

The majority of profit in most businesses – including yours - does not come from new clients. The true profit comes from additional purchases from existing clients or referrals. I read in one book ('All Accountants are Marketers') that the basic Profit Growth Formula for any professional firm is **B + BA + TF**, where:

B	Buy	The first sale made to a new client
BA	Buy Again	Additional sales made to a current client
TF	Tell a Friend	One of the most effective sources of profitable clients

<b>B</b>	<b>Buy</b>	<b>The first sale made to a new customer</b>
<b>BA</b>	<b>Buy Again</b>	<b>Additional sales made to a current client</b>
<b>TF</b>	<b>Tell a Friend</b>	<b>One of the most effective sources of profitable clients</b>

Of course, much has been written about accountants and other professional advisors asking for referrals, yet the truth is few partners or senior staff have the time or even the inclination to do this effectively. So it's probably no surprise to learn that according to Mark Lloydbottom in his book 'Clients for Life' he states:

*"97% of clients would happily recommend their accountants, yet 98% have never been asked."*

What's more, leads generated from referrals convert very highly, often close to 100%. So investing some time and effort into this route seems sensible.

# An annual customer survey for 'Relational Feedback'

As part of your overall marketing strategy, or as a stand-alone, you should consider an annual customer survey. You can either train someone internally to conduct it or outsource it to our team or another organisation.

Every reader of this report will have a customer list or database. At a simplistic level, once a year all these contacts need to be contacted with the aim of gathering valuable feedback plus referral opportunities.

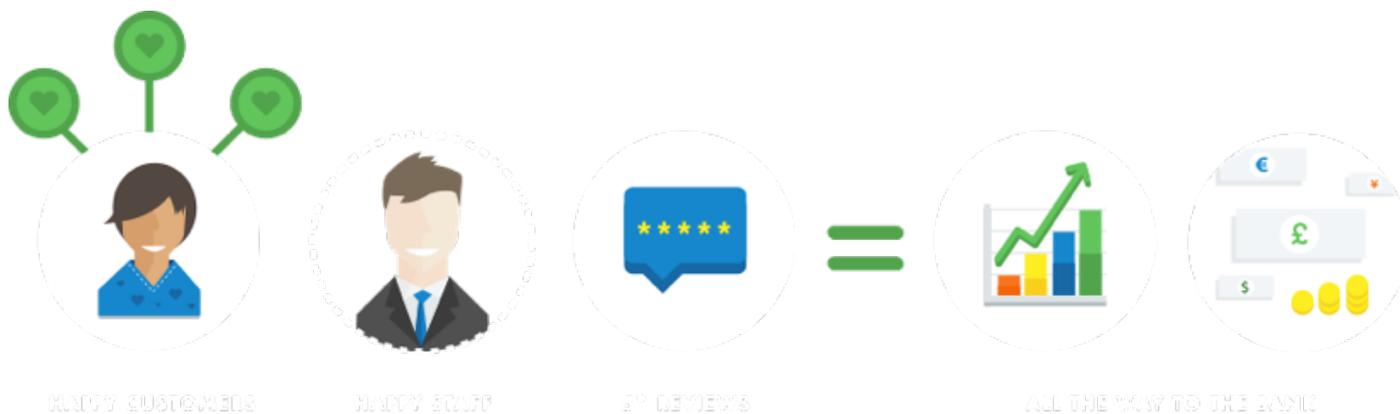


## How does it work?

Appoint someone to carry this out for you, either an internal person or a third party organisation like ours. If you were to use our team, here is an example of the process we follow:

1. NDA signed to protect your data
2. We write to all your customers explaining we are going to call them and the context of that call
3. One of our specialists makes the call (using a carefully defined framework). This call is designed to achieve the following:
  - Update all client data, confirming address, email, phone etc.
  - Ensure the customer is happy/delighted with the service you are providing
  - Gain valuable feedback to discover what you're doing that they love and what you may be able to improve.
  - If the feedback is 'high praise' then we may request testimonials and referrals from these 'super happy customers'
4. At the end of the campaign you are presented with a comprehensive report that gives you:
  - A benchmark score for your services
  - A pack of testimonials
  - Referrals: a qualified list of referrals provided by happy clients
  - A list of customers who are interested in additional services (if you request this)
  - Updated database with addresses, names, emails all validated and confirmed

Of course, you can adapt this process for yourself; it can be highly successful if carried out methodically, and by an expert on the phone, using a carefully developed, pre agreed formula.

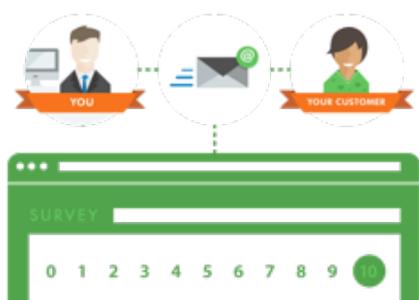


## Ongoing 'Transactional Feedback'

While an annual service questionnaire is great, it's important to gain regular transactional feedback from clients. Not only will this help with your client relationships, but every source of feedback from a client is both important and a potential lead generator. And that's exactly why we partnered with CustomerSure to bring accountants and other professional service firms one of the best transactional feedback systems.

It's a simple, online customer feedback system designed to improve your financial performance and spread your reputation for great service.

### How this transactional feedback tool works



#### Step 1: Check For Satisfaction

After you've provided a service for a customer, you email them a link to your Satisfaction Survey, which gives them the opportunity to tell you whether they're completely satisfied or not.

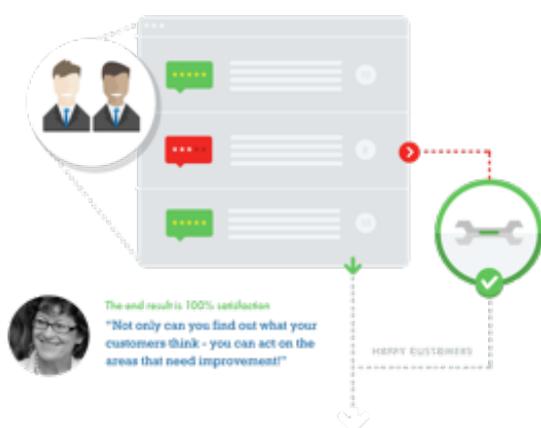
That's it for step one.

#### Step 2: Take Action

Jump on any problems and thank the customers who give you praise. You'll be impressing customers by fixing problems one by one and turning any unhappy campers into loyal fans.

#### Step 3: Grow Your Business

Share the feedback with staff to improve morale and keep everyone in-tune with your customers. You can also display the feedback as reviews on your website (if you like) to win new business, or just show overall satisfaction ratings!



#### Get up and running in under 15 Minutes

You could start following these steps with generic survey tools, or by whipping your CRM software into shape, or waiting for your IT team to hack something together in-house.

Or... you could be up and running in 15 minutes time, using delightfully simple software, built by experts specifically for improving customer satisfaction. Everything you need to make your customers happy, with no confusing distractions.

For more details visit [www.salesforaccountants.com](http://www.salesforaccountants.com) and click the software tab or discuss 'transactional feedback' during your free 1:1 Marketing Clinic. See page 65.

# marketing THE CLINIC

## Expert, independent Marketing Advice – FREE for accountants

Register for your free 1:1 Marketing Review and you'll discover new insights that are shaping the profession 'right now'. Carried out by phone (or Skype), your free Marketing Review will focus on any area of sales or marketing that's a priority for you, guiding you towards increased profitability by using the latest techniques that are already working for other professional service firms.

### Common topics include:

Everything we share with you during your 1:1 telephone session is based on our 30+ years helping professional firms to grow. The truth is, right now the old ways of marketing aren't working anywhere near as effectively as they used to. Register now

- What is working right now for other firms
- Mobile technology and Apps the benefits for your firm
- How to get your website performing better
- Predictable referral generation
- 6 proven steps to develop an inbound marketing campaign
- Live, interactive questions and answers.
- Effective email marketing

for this opportunity to upgrade your ideas about marketing and you'll discover how forward-thinking firms are using modern techniques to keep themselves at the forefront of the profession.

The Insight Marketing team explained interesting and straightforward practical strategies for accountancy practices to improve their service offering and grow their firms. Very well presented.

*Barber Harrison & Platt*



In a 1:1 with Insight I found them to be experts in the accountancy field. They're clearly a business that provides great advice on sales and marketing.

*Baker Tilly*



Register for your FREE Marketing Clinic today

@ paulinem@insight-marketing.com

UK 01325 469603 | AU 0280 155480 | USA 347 7489098, or simply scan the QR code

