

How to Win at Marketing Your Firm

HERE ARE 5 WAYS TO IMPROVE YOUR MARKETING



1.) STAY CONSISTENTLY CONNECTED TO YOUR CLIENTS THEY ARE YOUR FIRST, BEST REFERRAL SOURCE

Never underestimate the power of a client referral. After all, you've provided them with exceptional service and guidance. By consistently delivering quality service and expert guidance you stay front of mind with your clients.

2.) FOCUS ON YOUR NICHE AND DO MORE OF WHAT MAKES YOU PROFITABLE

Provide tax or financial advice to mechanics? Do more of that. Clients today want expertise in their business. They want their advisers to understand their challenges. Your expertise leads to more winning engagements.



3.) EMBRACE A DIGITAL MINDSET

Your website is your hub. Train your clients to 'live' on your site. Tax resources, whitepapers, staff updates, calculators, ways to contact you, upcoming events. Covid-19 has accelerated this digital explosion across all business disciplines.

4.) INVEST IN A CRM TO LEVERAGE SERVICE OPPORTUNITIES

Customer relationship management software (CRM) will allow you to have a running log of client engagements, opportunities and act as an essential communication tool for you and your team.



5.) SET UP A MARKETING PLAN AND EXECUTE

No matter how large or small your plan is - be sure there is a dedicated team member that ensures your marketing objectives are being executed on. If you're not measuring you're not marketing.



COMPILED BY KATHY HAYS

Hays Digital Group understands accounting firms. For over 25 years Kathy served as the marketing director for a Chicago-area firm, growing the practice from 5 to 65 professionals with three niche practice areas (including one national practice area) culminating in a sale several years ago to a national firm. Reach out to Kathy at khays@haysdigitalgroup.net