



The Definitive Guide to Online Marketing for Accounting and Financial Professionals

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INTRODUCTION

The value of marketing: perception is reality

When it comes to consumers and how they make decisions, the exact truth is less important than the interpreted truth. How consumers feel and what they think doesn't have to make logical sense, because the only thing that matters is what they ultimately do with their time and money.

For example, imagine that you just moved to a new city and need to take your Mercedes in for repair. You've driven by a repair shop on the way to work but it looks a bit dark and run-down on the outside. You decide to go out of your way to a different repair shop that previously caught your eye from its elegant signage and sleek garage.

While you didn't know anything about either shop's expertise before making your decision, your perception that one was more elegant - and therefore more qualified - drove you to take action and choose their business over the other.

Marketing helps you strategically shape the perception that people have of your firm. A disorganized, outdated website may lead clients to perceive that the firm is outdated, whereas an accountant with a professional website, dozens of reviews, and a strong social media presence is perceived to be smart, engaged, and trustworthy.

Through a strong and comprehensive marketing strategy, your firm can position itself above the competition and guide potential clients to choose you as their accountant. Read this whitepaper to learn more about the key components of a cohesive marketing strategy and the benefits, considerations, and pitfalls to avoid for each channel.

YOUR WEBSITE

The hub that connects all parts of your firm's online presence

Why You Need It

In today's digital era, having a website is crucial for any business. It's the cornerstone of your online presence and is likely the first impression prospective clients will get of your firm – so it's essential to put your best foot forward.

Set a strong first impression

Customers of all services now look up everything online before they buy. A professional website enables you to showcase your credentials, expertise, and testimonials to establish trust and build relationships before meeting clients face-to-face.

Streamline client communications

Clients visit a site looking for the facts. Whether they have a question about your hours or a particular service, the more helpful and informative your website is, the better you can reduce call volume and save time.

Your website is also a great place to showcase the various services you offer. To save time, look for a website provider who offers professional, pre-written content, but gives you the ability to customize it to your firm's needs.



Collect client information

Your website should ultimately serve to educate visitors and encourage them to contact your firm. By including strong calls-to-action throughout each page on your website with online forms, your website can collect leads and new client information so you can reach out to interested prospects.

Things to Consider

Who's going to build it

There are countless website providers that exist today. It's recommended that you find a company that knows the financial industry so it can be tailored to you and your client's unique needs.

How it will look

Visitors decide if they want to stay or leave your website in under three seconds, so you want your design to be professional and up-to-date. To create a consistent brand image that resonates with your target audience, it's important to use imagery and colors on your website that complement your other marketing efforts as well.

Remember, when it comes to website design, trends are constantly evolving. Find out what your website provider does to keep up, and if they offer free upgrades to ensure your website is always up-to-date.

Mobile responsiveness

Not only will 53% of visitors leave a website that isn't mobile-friendly, but search engines like Google will rank mobile-friendly websites higher on mobile search results, too. To ensure a flawless viewing experience across every device, your website must be mobile-friendly - which means it will automatically detect and resize to fit the appropriate sized screen, avoiding slow load times and the need to "pinch and zoom."

Secure access

Since the inception of the internet, the protocol to exchange information between a web browser and a webserver has been HTTP (hypertext transfer protocol). For some webpages, a more secure form was used—known as HTTPS with the "s" at the end for the word secure.

HTTPS websites are recommended as they add security which not only inspires trust, but delivers a positive user experience. Previously, if Google's Chrome browser encountered a non-HTTPS webpage which requested sensitive information, it would label the page as not secure. In the latest version of Chrome, however, the browser conspicuously labels any non-HTTPS site as not secure.

Therefore, with a HTTP website, visitors may receive an alert that warns them the website isn't secure, which may scare them, and cause them to hit the "back" button. By having a HTTPS website, you can ensure visitors feel secure and avoid a poor user experience.

The way to get a HTTP website is through a SSL certificate. Ask your website provider how to get started and they should be able to point you in the right direction (or provide the service for you).



vs.



Pitfalls to Avoid

Needless complexity

In the pursuit of a distinct website for your firm, it can be tempting to try and stand out by leaving “boring” or “stock” elements out, such as a top-level navigation bar, or a big “hero image” of you or your building. It’s okay to have some elements look the same as other accountant’s sites, as these are often best practices for navigating your information; don’t reinvent the wheel.

It’s also important to make your navigation intuitive and organized. Whether visitors want to read reviews or get more information about a service, it should be easy for them to intuitively get to the page they need within a few clicks.

Try to keep your header navigation between 6 to 10 options with dropdown menus beneath each to explore more. The dropdown menus should be limited to under six options as well.

Failing to update

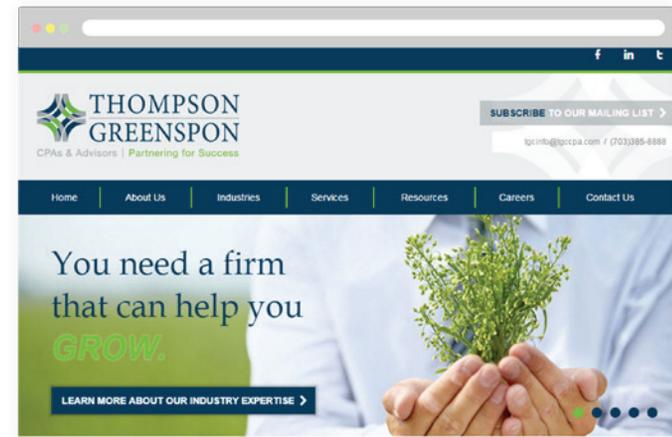
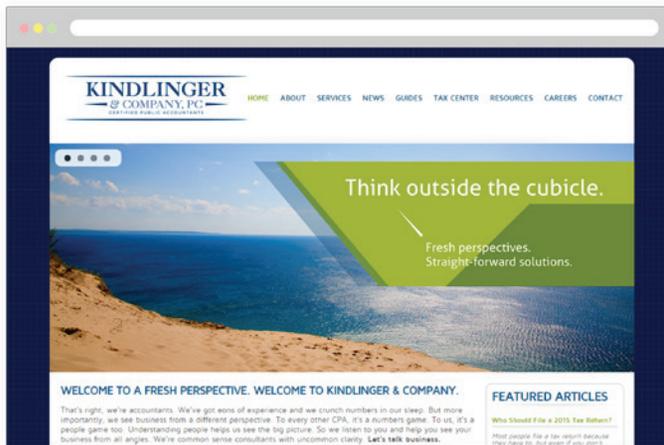
Whether you update your website on your own or instruct a website provider on what you’d like to see, don’t ever let a major change go unannounced.

Make sure to update your website for all things big and small including office hour changes, new services, new hires, and any upcoming events.

Whether you **update** your site yourself or instruct a website provider on what you’d like to see, don’t ever let a **major change** go unannounced.

Examples

A professional website will use high-quality images in the header that will immediately resonate with current and potential clients. The **navigation** near the **top** with clear organization. It also should include **strong calls-to-action** and **contact information** so visitors know what to do next.



SEARCH ENGINE OPTIMIZATION

Get found where everyone is looking: Google

Why You Need It

When someone searches for an accountant in your area, it's important that your website ranks high on the list of returned search results since most people won't go past page one. The way to get there is through search engine optimization (SEO). Simply put, SEO is the art and science of implementing various strategies to help your website climb to the top of search results.

Simply put, **SEO is the art and science of implementing various strategies to help your website climb to the top of search results.**

Set a strong first impression

Users trust the results that are returned by Google and other search engines. Therefore, the higher your website ranks, the more it will signal to a potential client that your firm is the best fit for what they're looking for (versus a website that appears on page 2 or 3).

Competition is fierce

If your firm is in a rural area, competition may not be high. However, most firms in a suburb or urban area will have many other accounting firms nearby, all competing to be #1, or at least listed on page one, on search results. The way that you climb rankings is through various search engine optimization techniques.

Both humans and robots need to know you

When someone performs a search online, a lot of work goes into the second that it takes to see results. Your website must be built in a way that both humans and robots can understand – to help your website rank higher for applicable search results.



Things to Consider

There's no instant gratification

When properly done, SEO can take weeks, if not months, to see positive results. This is because it takes time for Google to recognize your website and the changes made, compare it to everyone else's in the same space, and understand user behavior on your site.

On-site and off-site optimization

There are two main components of SEO: on-site and off-site optimization. A strong optimization strategy will include both.

On-site optimization refers to updates made directly to your website such as adding keywords to your content, updating meta descriptions and page titles, and creating a sitemap to help crawlers navigate your website and index it properly.

Off-site strategies occur outside of your website but can boost your visibility and increase traffic. These include building a strong social media presence, optimizing your business listings, and gaining links to your website from other credible websites (known as backlinks).

Google Analytics

One of the most important aspects of marketing is tracking your results. Ask your website provider to implement Google Analytics (GA), a free online tool, to help you track key performance indicators on your website overtime.

Pitfalls to Avoid

Black hat SEO tactics

Genuine "white hat" SEO tactics take time to see results, but it helps you build a strong foundation that sets you up for long-term success with your organic search rankings. "Black hat" SEO tactics are unethical means of temporarily tricking search engines into showing your page in more searches. These tactics include:

- **Keyword stuffing:** simply repeating a keyword like "accountant" over and over again on your page to attract crawlers.
- **Link-building scheme:** paying disreputable sites to provide countless backlinks to make your site seem more well-liked.
- **Ghost pages:** a keyword-stuffing page is presented to a Google crawler to get a good ranking, while another well-written page is presented to a human visitor so the site quality doesn't suffer.

These and other black hat tactics may work for a little, but if caught, Google can penalize your site by ranking it poorly, or even blacklisting it so you don't appear in any search results.

Content plagiarism

Not only is it very easy to detect plagiarism, but it can result in blacklisting your site from Google search results and damage your reputation among those who learn of it. You can also be docked SEO ranking for duplicating one of your own pages on a second page. You don't have to fear explaining something similar in two locations, but you should always strive to create or hire someone to create original content for you.

Examples

This is how a typical link is shown on Google's search engine results pages (SERP). It is made up of three components:

1 Tax Prep Services - Contact Catherine Bell CPA in Los Angeles

2 www.catherinebellcpa.com/services/tax-preparation

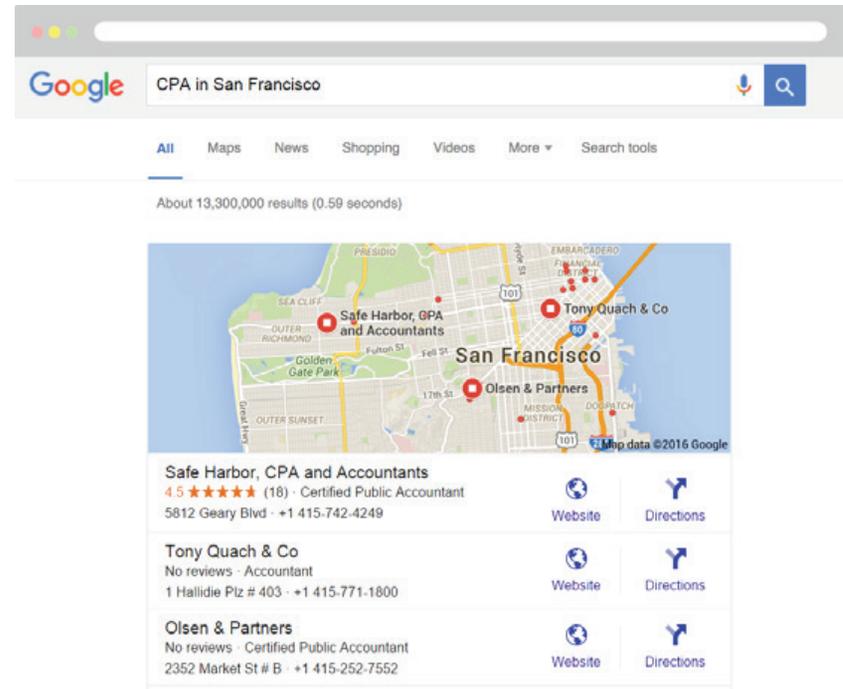
3 Don't put it off any longer! Contact Catherine Bell today and get your tax refund sooner! New client specials available. Call NOW! (800) 866-4500.

1 **Title Tag:** Should tell visitors and search engines what they can expect from the webpage in a clear and concise manner

2 **URL:** Can contain keywords similar to the title tag to help searchers feel like the page they will go to is relevant to their search.

3 **Meta Description:** Designed to get someone searching to click your link. Keywords in meta descriptions do not affect your rankings, but the click throughs can - which is why it's important to make the copy enticing and invite searchers to click.

Below is a typical **SERP** for the search query "accountant in San Francisco." Below the map (snack pack) will show **10 organic results**. To enhance your chances of being listed in the snack pack, it's important to verify and optimize your firm on Google My Business while requesting and gaining positive client reviews.



SOCIAL MEDIA

Your direct connection with your audience and their friends, family, and coworkers

Why You Need It

Social media is a great way for accounting firms to build relationships, increase referrals, and drive more traffic to their website. Plus, it helps you become more transparent, reinforce credibility, and create a stronger, well-rounded online presence.

Reinforce trust

By having a strong presence on social media through joining the conversation, listening to the needs and wants of your clients, and adding value where you can, your firm will build credibility and trust among potential new clients.

Manage your online reputation

Today, many people take to social media to share positive or negative experience with a brand, accounting firms included. Many people also reference online reviews to choose between service providers.

Your firm can use social media to encourage happy clients to leave a review so others can see what it's like to work with you.

By having a strong presence on social media through joining the conversation, **listening to the needs of your clients, and adding value where you can, your firm will build credibility and trust among potential new clients.**

By frequently responding to all feedback on your page in a professional manner, you show potential clients that your firm genuinely cares about delivering high-quality service and satisfaction.

Increase referrals

Social media is today's form of word-of-mouth marketing. It's a great way for clients to share the word about your firm to their individual networks of friends and family. The more clients post about your firm (and tag you), the easier it is for others to click and learn more about your office.

Things to Consider

Determine your channels

There are so many social media channels to choose from, and it may be difficult to identify which ones your firm should be on. Below is a summary of the most commonly used social platforms today:

Facebook: With the largest following of any network and the widest range of ages in users, you can be sure to find a local audience here. It allows for posts of any length, and photos and videos uploaded directly. You can collect client reviews, learn more about clients by posting poll questions, and more.

Twitter: This channel is all about conversation and current events. If you're able to be topical, politically correct, and can respond at a moment's notice, you can make Twitter work for your firm. Use #hashtags to help posts get found and post at least once a day on this network.

Instagram: All about the visuals, this platform is a great place to showcase pictures of your team and your office.

YouTube: Whether you're sharing videos that explain procedures or showcasing client testimonials, YouTube is a great place to host videos and then share them to your other social networks.

LinkedIn: This platform is specifically designed for business use. You can use this platform to accelerate business connections, conduct research on current clients and prospects, and post and share articles to increase credibility.

Build your profiles

Each social platform has a place for you to build a description or "about us" section so visitors can learn more about your firm. Where you can, include your URL, address, hours, and phone number. In your description, to save time and ensure consistency, use similar verbiage to the "about us" from your website.

What you post and when

Be intentional with what you post and how often you do so. To ensure you're always adding value, make your posts relevant to the needs, desires, and common questions that your target audience would have.

Pitfalls to Avoid

Inconsistent schedule

It's better to post only once or twice a week, on the same day each week, versus posting every day for a week but then not doing so for another month. People will be more likely to follow your page if they know you're consistently providing helpful and relevant information.

Spam posting

Social media is about being social. And while it's OK to promote your services directly from time-to-time, make sure to mix this in with other types of educational content to avoid appearing overly promotional.

EXAMPLES



Educational Content

This is the best type of social media you can engage in to become an authority in your field. Create original and useful information, or share from a highly-trusted source and add a unique insight from your perspective. With the right hashtags, these posts can be found by people who haven't liked your page yet to expand your reach. Convey a tone of professionalism, continued learning, and genuine interest.

Original Branded Content

Pictures of your office, yourself, or your clients along with testimonials and other positive messages help develop your brand. This is a great place to showcase your personality and build transparency with current and potential clients. It's a way for you to show a more "human" side to your firm while engaging with followers.



Shared Semi-Relevant Content

Sharing content that is accounting-adjacent helps round out your social media offerings by showing that it's not all business or all about you. This is a good place for jokes, local event information, and anything else that is just one step removed from your business.

PAY-PER-CLICK (PPC) ADVERTISING

Quickly target specific groups of clients while getting found on page one of search results

Why You Need It

Pay-per-click advertising is a growing marketing channel that allows you to quickly get listed on page one of search results. You can target specific groups of potential clients based on demographic information including age, income, and location. Plus, you only pay when your ad is clicked, giving you the opportunity to have high-performing campaigns that deliver a greater return on investment.

Be easily found on search results

While SEO is a great way to get better organic rankings, it does take time and effort to climb to the top of results. With Google Ads, you can get your firm in front of potential clients at the exact time they're looking for the services you offer and be ranked on page one within a day.

Target multiple geographic locations

While SEO can only really target the exact neighborhood or town your firm is in (because it has to contain specific and accurate information), PPC allows you to target your ad to appear to people who are searching from areas near but not actually in your town, so that you cast a wider net for people who still could realistically use your services.

Get better tracking and improve ROI

PPC advertising allows you to fully track the journey of leads to your landing pages and website, all the way through to them contacting your firm.

With better data, you can understand which ads and messages work best, improve your strategy, and increase your overall return on investment.

With **Google Ads**, you can get your firm in front of potential clients at **the exact time** they're looking for the services you offer and **be ranked on page one** within a day.



Things to Consider

Keyword research tools

Google Ads has a “keyword planner” feature to help you identify the right keywords for your campaigns. The tool helps you understand which keywords are most relevant, have the most competition, and what the cost is of each. It also may prompt you with other ideas on keywords and phrases to consider. It can take a lot of tinkering to get to your best performing keywords; there is an entire industry built around this, so it’s not exactly easy to perfect. If your website provider offers PPC advertising help, it may be a good idea to accept it.

Target your campaigns appropriately

To avoid attracting unqualified leads to your ads, it’s important to target your ads appropriately and choose the right demographics such as age groups, income brackets, and location. With the right targets, you spend the least money for the most clients.

To avoid wasting your advertising budget, it’s a good idea to set negative keyword lists, which blocks ads from appearing on specific searches.

Use negative keywords

To avoid wasting your advertising budget, set negative keyword lists, which blocks ads from appearing on specific searches. This ensures irrelevant traffic doesn’t click your ad. For example, you can set it so your ad doesn’t appear for those searching for “cheap,” “discount,” or “free” accounting services.

Test, test, test

To ensure you’re always improving results, it’s important to test the messages of your ads. By running single-variable comparison tests of different ad text, different calls-to-action, and different keyword groups, you can discover which ads get the best results and optimize them for the future. It’s a lot of work but always pays off.

Fee structure of PPC consultants

As you might have gathered, it takes a lot of effort and knowledge, and a bit of risk to set up, run, and optimize Google Ads campaigns and landing pages. Hiring PPC experts can certainly help. When you’re comparing options, companies typically fall into two types of fee structure. The first kind charge for a percentage of your ad spend, whereas others go by monthly fees. It is always ideal to go with the monthly fees, as the companies that charge by percentage have a conflict of interest; they have an incentive to always increase your ad spend, even when it wouldn’t necessarily benefit you.

Pitfalls to Avoid

Out of control spending

One of the most important parameters to set when running PPC campaigns is the daily and monthly budget.

For example, there are times that Google tries to help you by spending up to 20% over-budget on high-volume days, which vary depending on your keyword lists. This is done in an effort to ensure you don't miss out on a bunch of searches from high-quality traffic.

The problem appears when there are numerous high-volume days in a month. This is why also choosing a monthly budget is so important; to ensure you never go over the allotted monthly amount. This, and many other spend-related pitfalls are why it's so important to have experts help you navigate Google Ads.

Every ad should have a **specific landing page** that focuses on a similar message to the ad.

Breaking the rules

In the pursuit of high-quality and honest advertising, Google has many policies about what you say and how you say it in ads. There are basic rules that apply to things like misrepresenting your company or yourself, and copyright and trademark infringement. Nothing offensive is allowed either, of course. These policies do change from time to time and need to be checked frequently. Keeping aware of these rules is one less thing for you to manage if you have an expert doing the work.

Having inaccurate landing pages

Your ads should not simply send viewers to your homepage. Instead, every ad should have a specific landing page that focuses on a similar message to the ad.

For example, if your ad is about payroll services, you'll want a landing page that speaks specifically to payroll. If you send them to your homepage, visitors would have to then look for information about payroll services on their own, but would be more likely to simply hit the "back" button.

Examples

For optimum results, continually test the messaging on your PPC ads to see which performs best.

- A Los Angeles Area CPA
Ad www.catherinebellcpa.com/tax-prep
Tax Preparation Services . Get Your Refund Faster! Call Now!

- B Tax Preparation Services
Ad www.catherinebellcpa.com/tax-prep
Los Angeles Area CPA . Get Your Refund Faster! Call Now!

In this first set of ads, the description varies just a bit by highlighting services versus location. To find out which one motivates people to click the ad and make a call, testing is a must.

- A Los Angeles Area CPA
Ad www.catherinebellcpa.com/tax-prep
Tax Preparation Services . Get Your Refund Faster! Call Now!

- B Santa Monica CPA
Ad www.catherinebellcpa.com/tax-prep
Tax Preparation Services . Get Your Refund Faster! Call Now!

In the previous test, the description from test A won. Using the winning description, the firm now wants to test to see if there's a difference with advertising Los Angeles Area CPA versus Santa Monica CPA.

*You can test small changes endlessly to optimize your return on investment; it takes a lot of time and detailed work, **which is why it's best left to an expert company.***

REPUTATION MARKETING

Taking charge of online reviews

Why You Need It

Online reviews can make or break a firm

Did you know 97% of consumers read online reviews before they decide to buy? And, 85% feel an online review is as credible as a personal recommendation?¹

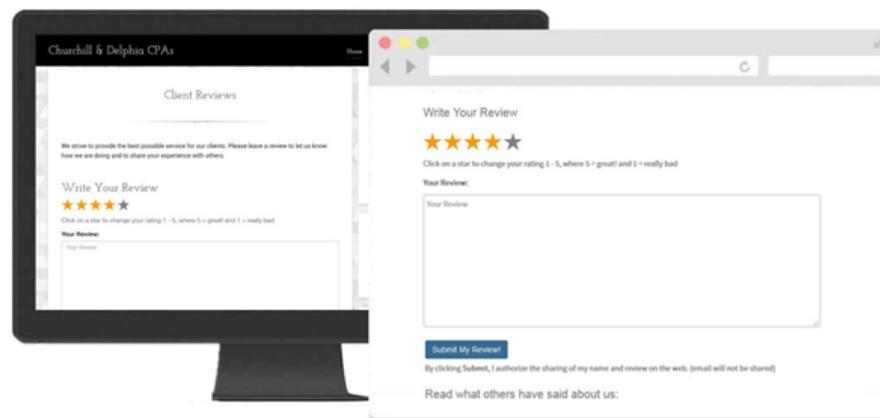
Known as reputation marketing, acquiring and managing online reviews is one of a practice's highest digital marketing priorities.

The need to respond to negative reviews

Rightly or wrongly, negative online reviews deter 94% of customers from contacting a business.² Therefore, regardless of your expertise or rapport, online reviews will factually drive away clients from your office. However—if you address the review quickly and with concern, you can restore faith in your firm. We'll show you how.

Best to have a plan

Whether in the marketplace or on the battlefield, having a plan—as opposed to random skirmishes—is the best guarantee of success. As in your social media marketing, thoughtful participation and diligent monitoring are two key fundamentals of reputation marketing. Done well, you—not your clients—will be back in control of your online identity.



Things to Consider

Ask clients about their visit in the office

Train staff to ask clients how their appointment was before they leave the office. When clients praise your work or services, have office staff ask them if they would share their satisfaction in an online review, as most will. In fact, 70% of consumers will leave a local business review, if requested.³

70% of consumers will leave a local business review if requested.³

You can make it even easier for clients to leave a review by having a sign with a QR code or link to the pages that you would like a review left. If that isn't feasible, send a text message or email with a link to your preferred review site and invite clients to leave a review for your business.

This also gives your firm an opportunity to learn if someone is less than satisfied with their appointment so you can address the issue right then and there to prevent a potential negative review when they arrive at home.

Monitor vigilantly

These days, Google and Facebook are the top review sites though Yelp is still a major player in this arena. In addition to reviews, sites like Google and Yelp will ask clients to rate your firm using a five-star system where one star indicates a highly negative experience and five, a highly positive one. The site then uses a proprietary algorithm—its own unique set of calculations—to tally up the ratings and devise an overall one for your business. That rating, which will be represented by a number of stars, will display on the site's profile of your firm and in search results that include your business. An overall rating of three or less stars is a red flag and an indicator you need to work more diligently and rapidly on your reputation marketing.

We recommend monitoring your social media ratings and activity through automated alerts, a service most review sites provide. Your best bet, however, is to have these sites consistently checked by an employee to make sure nothing is missed. You can also set up Google alerts to notify you any time you or your business is mentioned publicly online.



Respond quickly and calmly

Both metrics and logic make a convincing argument that negative reviews need to be addressed. In fact, 53% of individuals posting a negative review expect a response within seven days. However, nearly two-thirds indicate receiving no response at all.²

Ignoring reviews reflects poorly on your business; worst case, it makes you look uncaring—best case, it makes you look neglectful. However, responding angrily is even more damaging for now it appears as if dissatisfied clients have no recourse to rectify their grievances.

68% of users trust reviews more when they see **both positive and negative feedback**.⁴ The key is addressing reviews promptly and with a sincere desire to rectify any mistakes.

When you receive a negative review, first and foremost, keep your cool. Presuming the client is legitimate, draft a positive response offline that shows you genuinely care about their service and well-being. Indicate your office will be contacting them or, if the client prefers, request he or she call your office.

When you are done drafting your response, have a third-party check it for suitability. Once you are satisfied it is an appropriate response, post it. Your objective is to (1) publicly demonstrate your concern and (2) move the conversation offline. If you're able to remedy or at least improve the situation, it's permissible to ask the client if they might update the review.

While you may feel hesitant to respond, remember that 80% of consumers believe that a business cares about them when management responds to their reviews.³

When the occasional bad review appears, don't despair. Ironically, 95% of users distrust a company that has all glowing reviews. Additionally, 68% trust reviews more when they see both positive and negative feedback.⁴ The key is addressing these reviews promptly and with a sincere desire to rectify any mistakes on the part of your firm.

Don't ignore the positive reviews

Considering reviewers expect a response to good and bad feedback, it makes sense to thank a client for positive online feedback. There is no need to overdo it with gushing gratitude; be sincere, appreciative, and let them know to call on you if they need anything further.

Take an honest look at your firm

No one likes to be criticized, particularly in public. However, negative reviews can be put to good use by examining their causes. Perhaps you've received multiple complaints about long wait times, inattentive staff, or billing errors. If this is the case, take a look at your firm through a client's eyes and see how you can improve their experience. Then, once new processes or updates are made to your firm, share the positive update on social media.

Pitfalls to Avoid

Fake negative reviews

The only thing worse than a bad review, is a **fake** bad review. Even so, remember the cardinal rule: remain calm.

Verify, as feasible, the author is not a client of record. Then draft a response which demonstrates you care but also indicates you do not have him/her as a client. Finally, approach the site to remove the review while continuing your efforts to get more positive reviews from happy clients.

Not sticking with it

Like any endeavor, reputation marketing requires constant attention to achieve optimal results. Acquiring reviews, monitoring multiple review sites and responding to all online comments takes a commitment of time and resources. Luckily, portions of this process can be automated. Look for providers of accounting marketing systems which provide review collection and monitoring capabilities.

Don't offer incentives

While the intention may be good, it's advised to not offer incentives in turn for a good review, as this may not seem genuine. A disgruntled client or staff member could post the offer on your social media site, causing considerable harm to your online reputation. Additionally, offering undisclosed incentives for favorable reviews could violate FTC guidelines.



Examples

Here are examples of appropriate and inappropriate responses to both positive and negative reviews.

Negative Review 🗨️

Bill M: Before I saw ABC Accounting called to make sure they would be able to help me with what I was looking for within my budget. A few months later they billed me FAR more than what was quoted. They obviously don't have it together. I don't recommend this place.

✗ Damaging response:

We don't know who you talked to when you called but no one remembers you calling. You probably misunderstood what you were told. We have hundreds of happy clients.

✓ Appropriate response:

Dear Bill,
Thank you for providing us with this feedback.

We want to make this right – so we've left you a voicemail to see how we can resolve this. We have also since clarified the issue with our staff to ensure these types of mis-communications don't happen in the future. Our clients' satisfaction is our top priority and we're sorry you had a less-than-positive experience.

The first response engages the client in an online squabble. By contrast, the second response concedes the error, apologizes, remedies the situation, and clearly demonstrates concern for clients.

Positive Review 👍

Debbie P.: I love this place! ABC Accounting is awesome at what they do. Everyone on staff is very friendly, too. I recommend everyone go to them for any tax needs! I will definitely be back.

✗ Damaging response:

Dear Debbie, Thank you very, very much for this wonderful review. I can't express how much we appreciate it because we work so hard to provide clients with the best customer experience. I will circulate your review to the staff. I am sure they will be very moved. Thanks once again. Have a great day!

✓ Appropriate response:

Thanks so much for your feedback, Debbie! We are gratified we could provide you with such a positive experience and look forward to seeing you again.

In the first response, the firm fawns over the client and gives the impression receiving a favorable review is a rare occurrence. The second response is a sincere yet dignified thank you.

AUTOMATED CLIENT COMMUNICATIONS

The most cost-effective way to fill your schedule.

Why You Need It

As in any business, engaging customers in your services is essential to success. That's why ongoing client communications are so critical, particularly in an accounting firm where several months can transpire between visits. For an average firm with many clients, manually keeping in contact with the entire base is virtually impossible. That's where automated communications systems come into play—it does the work for you at a fraction of the time and cost.

Give clients what they want

Did you know clients prefer text appointment reminders over email, phone calls, and direct mail? And, 3 out of 10 consumers would give up phone calls to use messaging.⁵ For maximum response to appointment reminders, it makes sense to reach out to clients via the channels they prefer most.

Increase efficiency and keep your schedule full

Most firms lose revenues due to no-shows, cancellations, and an inactive client base. While figures may vary, no-shows and cancellations can cost a small business thousands of dollars a year. Automated client communication systems can help you win the battle and the war. To keep your appointment book—and your bank account—full, automate your client communications.

Things to Consider

Ease of use

A cumbersome, difficult-to-use system will be shunned by your staff. They will either use the system much less frequently than they should or revert to a manual system. Make sure your automated system is user-friendly.

Multiple channels that cater to client preferences

The most effective automated systems will enable you to reach clients in the ways that they prefer most. And, because your firm is likely missing complete contact information for every client, look for a comprehensive system that supports various communication types.

Ability to track results

One of the most important aspects of marketing is understanding what's working best. Opt for a provider who can deliver dashboards and measure the results and return on investment for your campaigns.

Customer service

Regardless of how advanced a system may be, if you cannot get it to work or get questions answered, it won't be very helpful to your firm. When choosing an automated client communications provider, learn what their training and support on the system looks like upon implementation and post go-live. Additionally, understand their standard phone support hours and ask questions about how often they perform upgrades to ensure your system is always up-to-date.

Pitfalls to Avoid

The status quo

If your client communications are conducted manually, moving to an automated system may seem daunting, however, when you examine the purpose and benefits of automation, it warrants a second look.

Computers store and retrieve information and perform repetitive tasks at speeds far surpassing those of humans. For example, where a typical employee spends 20% to 40% of their time at work searching for files or documents, a computer can retrieve a client's file in a fraction of a second.⁶

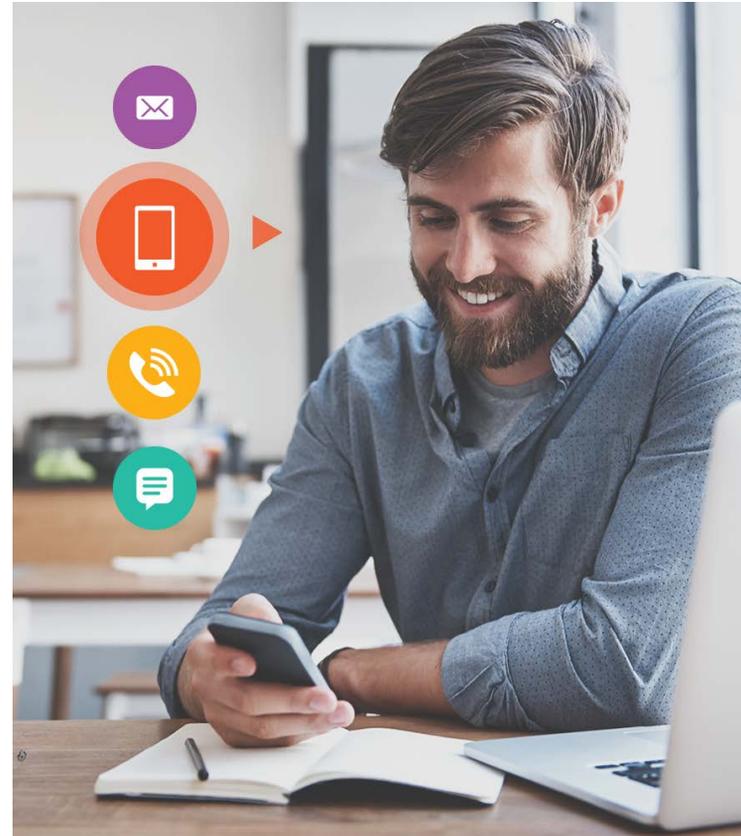
Add to that, 40% of productivity is lost to interruptions and other forms of task-switching.⁶ A computerized system, however, not only will perform a repetitive task doggedly until it is complete with no unnecessary interruptions, but it runs 24 hours a day, long after employees have gone home. These are just a few examples of how the benefits of automation outweigh the temporary disruption that implementing a new system may cause in your firm.

Contracts and hidden fees

Long-term contracts can lock you into a system that may not suit your needs in the long run. While some providers insist on a one-year contract, others provide monthly agreements. We recommend carefully reviewing any contract before signing.

No marketing assistance

There is more to eliciting a response to automated communications than meets the eye—it requires a bit of marketing savvy. That's why we recommend looking for a provider that includes pre-built marketing campaigns based on best practices for accounting and financial firms.



Examples

Text appointment reminder

Appointment reminder texts allow clients to confirm quickly and easily.

Dear Bill, This is a reminder that you have an appointment at ABC Accounting on Monday, April 6 at 2 p.m. Please reply C to confirm. We look forward to seeing you!

Email appointment reminder

Like the text reminder, an email reminder should enable the client to easily confirm.

Dear Judy,
This is a friendly reminder that you have an upcoming appointment at **ABC Accounting**. Please confirm so we can reserve this time for you.

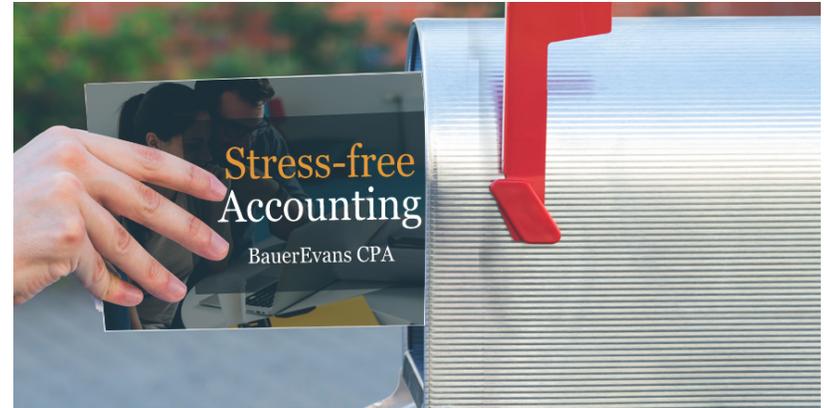
Tuesday, June 15 at 9 a.m.

123 Street #203
Chicago, IL
555-555-5555

CONFIRM APPOINTMENT 📅

Postcard appointment reminder

Despite the popularity of digital communications, people still look through their direct mail pieces. A reminder postcard with an attention-grabbing design will get noticed.



CONCLUSION

Online marketing is essential to success, and each part plays a vital role

Reading through this guide, it's easy to see that online marketing is a fulltime job. To court your current clients and potential new ones, you need a fleshed-out website, strong SEO efforts, active social media profiles, and a modest advertising budget. In today's online world, you need multiple places on the Internet that helps visitors (prospective clients) discover information about your firm while driving more traffic to your website.

With so much involved in website design and online marketing for your accounting or financial firm, it's best to seek a company who knows your industry well and delivers a comprehensive suite of solutions that are proven to deliver long-lasting, measurable results.

CPA Site Solutions® is the author of this guide and can help you become even more familiar and successful with all of these services tailored specifically to the unique needs of your business.

Contact us today for more information on using **online marketing** to make your accounting firm a success.

[Start a FREE 60 Day Trial Today >](#)

ABOUT CPA SITE SOLUTIONS

CPA Site Solutions helps accounting and tax professionals accelerate their firm's growth and acquire new clients through innovative online marketing solutions.

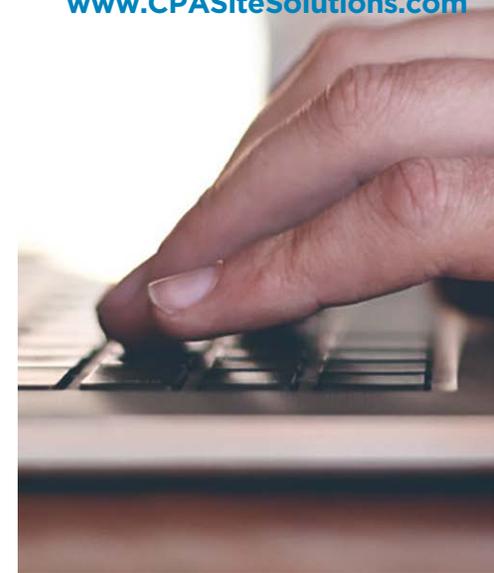
We take a consultative approach and create tailored marketing strategies that support your firm's goals through our comprehensive suite of online marketing solutions.

- **Website design.** We communicate your expertise through professional designs, industry expert written content, and interactive features. Every website also includes a secure firm portal that allows you to quickly and securely share files with your clients.
- **Search engine optimization.** Our fully integrated approach, combined with two decades of industry experience help you climb to the top of search engine results pages and get noticed by prospective clients.
- **Pay-per-click.** Pay-per-click. As verified Google partners, our team knows exactly how to create successful, cost-effective pay-per-click campaigns that deliver measurable results.
- **Social media management.** We will manage your entire social media presence with engaging posts and branded profiles that encourage followers to like, share, and connect with your firm.
- **Automated reminders.** Through timely, automated text messages and emails, we help ensure clients arrive on-time and well-prepared for their appointments while reducing no-shows and improving profitability.

Discover why CPA Site Solutions is trusted by over 7,500 accountants for their online marketing needs.

(800) 896-4500

www.CPASiteSolutions.com



SOURCES

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2. ReviewTrackers: [6 in 10 Consumers Now Look to Google for Reviews](#)
3. ReviewTrackers: [Google Is Dominating the Review Market](#)
4. Bizibl Marketing: [Bad Reviews Are Good for Business—The Power of Negative Reviews](#)
5. Text Magic: [52 Text Messaging Statistics for Businesses](#)
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