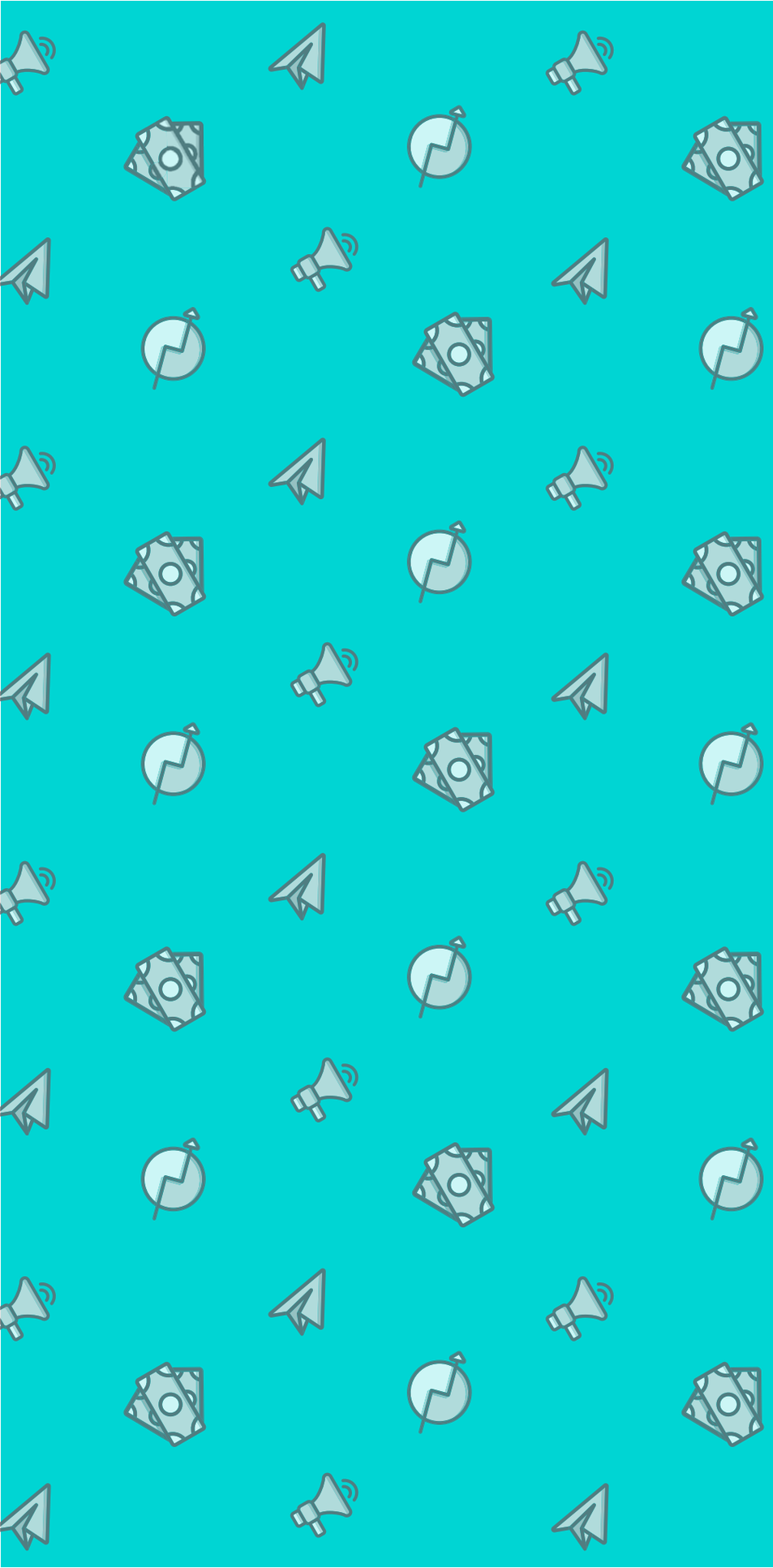


Marketing Essentials

For Tax Pros

A step-by-step guide to finding, reaching, and expanding your client base.

Brought to you by

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01

Introduction to Marketing

Like it or not, if you're a small business owner, you're also a marketer.

That may be a scary thought, but don't despair. We've created a simple, comprehensive guide specifically to introduce you to all of the tips and strategies you need to jumpstart your digital marketing. By the time you reach the end of this ebook, you'll have the knowledge you need to expand your client base and better serve your current clients through basic marketing practices. We'll show you how to optimize your website for potential clients, build and engage with a social media audience, successfully launch a referral program, and more.

Managing Your Time

Think you don't have enough time for your marketing efforts to be effective? It only takes a little time to make a big difference. The best way to make sure your marketing tasks get done (instead of pushing it off until "tomorrow") is to schedule reminders for yourself.

Here's what we suggest:

Daily

Social Media **5-10 minutes**	Post on your social media channels and interact with your followers.
Referral Business **As Needed**	Asking for referrals should be integrated into all of your client and professional networking interactions. Instead of setting a schedule for referral requests, try setting a goal to ask for a certain number of referrals each day based on your expected number of appointments.

Weekly

Online Reviews **5-10 minutes**	Check your review site pages (such as Google My Business and Yelp) and interact with any recent reviews.
PPC (Pay Per Click) Advertisements **5 minutes**	Look for any significant spikes or dips in ad performance, and make needed changes as explained in chapter 7. If everything is performing as expected, leave it alone.

Monthly

Review & Evaluate **10-15 minutes**	Briefly review your marketing efforts as a whole for the month. Compile relevant numbers (such as ROI). Unless anything needs obvious adjusting or follow up efforts, save the more in-depth analysis for your Quarterly and Annual reviews.
Website **5 minutes**	Quickly browse through your website to make sure everything is working as it should.
Email **30 minutes**	Write and send your monthly newsletter. If you're using a service like TaxProMarketer, take a moment to add a personal touch to their monthly newsletter template.
PPC (Pay Per Click) Advertisements **30 minutes**	Take some time each month to decide whether your PPC ads need to be updated. Particularly on Facebook, ads run for too long can lose their effectiveness. Spend this time coming up with new ads you can use to replace ineffective or tired ads.

Quarterly

Review & Evaluate **30-60 minutes**	Three months is enough time to give you a good idea of what is working and what needs to be adjusted. Compare your monthly numbers against your yearly marketing goals and adjust your efforts as needed.

Yearly

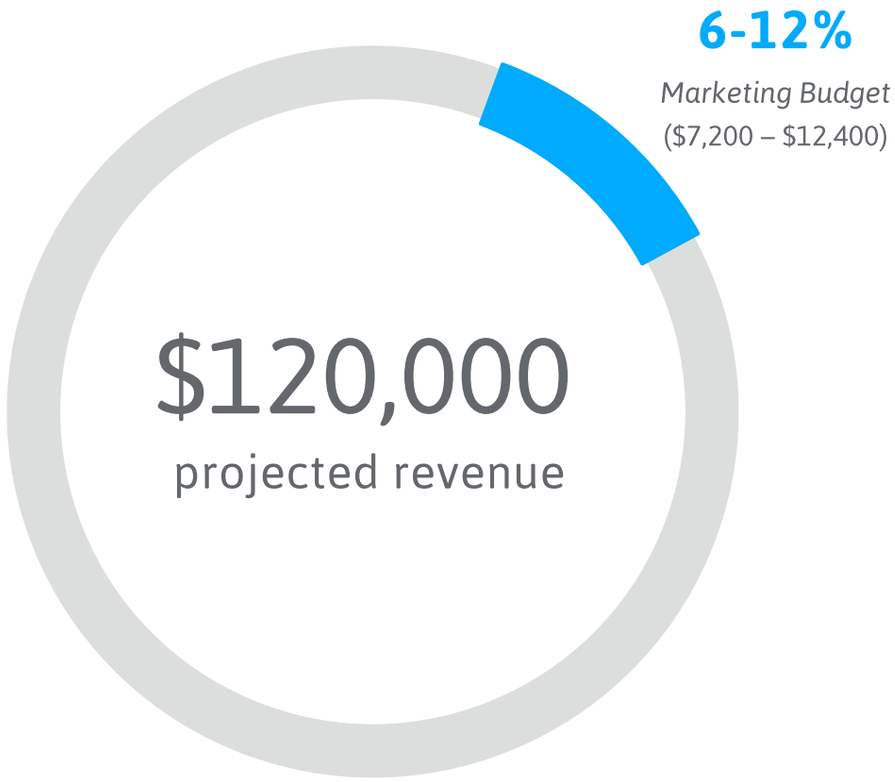
Review, Evaluate, Plan, & Budget **5-10 hours**	Evaluate the past year's marketing plan. Take stock of what worked, what didn't, and what you want to do differently going forward. Use this data to help set goals for the year to come. Next, plan specific actionable steps you will take to achieve your goals. Don't try to hammer out your entire marketing plan and budget all in one sitting. Instead plan to take a few days, or even weeks, to put together your annual marketing strategy.

Managing Your Budget

Investing in marketing can be scary, but a good marketing plan backed by a realistic budget can yield impressive results. Knowing how much to spend and where to spend it has the potential to make or break your marketing efforts.

Start With Revenue Goals

Laura Mintz, the founder and CEO of Elevate My Brand, suggests that established businesses plan on spending "between 6 and 12 percent of [their] gross revenue or projected revenue." So how much did your practice take in last year, and how much do you want to increase that next year? Use those numbers as the foundation of your yearly marketing budget.



Managing Your Budget

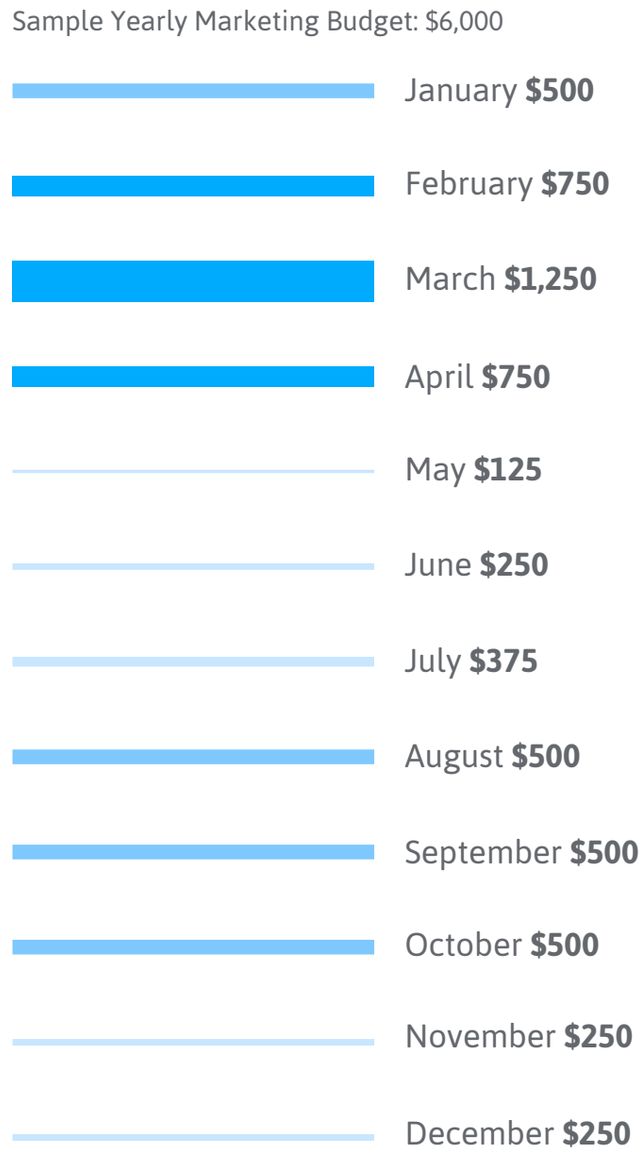
Once you have an annual budget, the next step is to determine how to spread that out over the year. Keep in mind that some months—like those leading up to tax season—will require more of your marketing budget than the slower months between tax deadlines.

Example Month by Month Budget Allocation

Your month-by-month marketing budget will almost certainly look different than this. For instance, if you want to promote your tax resolution services, you likely won't want to scale back your marketing so dramatically between tax deadlines. When you're structuring your budget, focus on using the available funds to support the needs of your business and customers and you'll find the right balance for you.

Key Points

- Tax season months will likely require the largest portion of your budget and annual marketing efforts.
- The months between tax deadlines will require less of your marketing budget, but ramp up your efforts for the upcoming September and October tax deadlines.
- After the fall tax deadlines, you can scale back your marketing efforts through the end of the year.



Measuring Success

It can be hard sometimes to see the impact of your marketing dollars, so you need to set some measurable markers of success before you start. Tracking and optimizing things like leads generated, leads converted to clients, increased web traffic, and increased social engagement will help you identify issues and correct them as you work toward the ultimate goal of increasing revenue.



Managing Your Expectations

Marketing is a trial by fire. You may try something new that turns out to be a total flop with no return. When that happens, keep in mind that there is value in learning where not to spend, and as long as you are tracking results, you will never have to make that mistake again. As you continually learn what does and doesn't work for your audience, your ROI will steadily improve and you will become an expert at marketing your practice.

Expect to

learn as you go.

Don't be afraid to try new things. You'll learn a lot as you go, but don't let inexperience keep you from starting.

Expect to

invest time.

A good marketing strategy will require a consistent time investment to be effective.

Expect to

spend money.

Your website, marketing software, and advertisements will all cost you money, but if done right, you'll make your investment back multiple times over.

Expect to

make adjustments.

Marketing success is impossible to predict perfectly, so expect to make changes to your plan as you go.

02

Your Website

A good website is the foundation of all of your marketing efforts going forward.

It’s estimated that more than 265 million Americans regularly used the internet in 2016. And in case you think that your tax practice is somehow exempt from this digital tidal wave, the Harvard Business Review thinks differently. They rank Consumer Financial Services as the third most disrupted industry by the digital revolution.

Is Your Website Meeting the Mark?

Evaluation time! Take a good, honest look at your website and check the boxes that you feel describe your site.

Website Checklist

- [ ] Loads in three seconds or less
- [ ] Clean and easy to navigate
- [ ] Easy to find contact info (phone number, email, business hours, address)
- [ ] Clear explanation of your services
- [ ] At least one client testimonial
- [ ] A clear call to action on each page
- [ ] Works on mobile devices
- [ ] Easy for clients to understand (no jargon)
- [ ] Genuine, up-to-date pictures

If your website meets:

All of the requirements: Awesome! You're good to go!

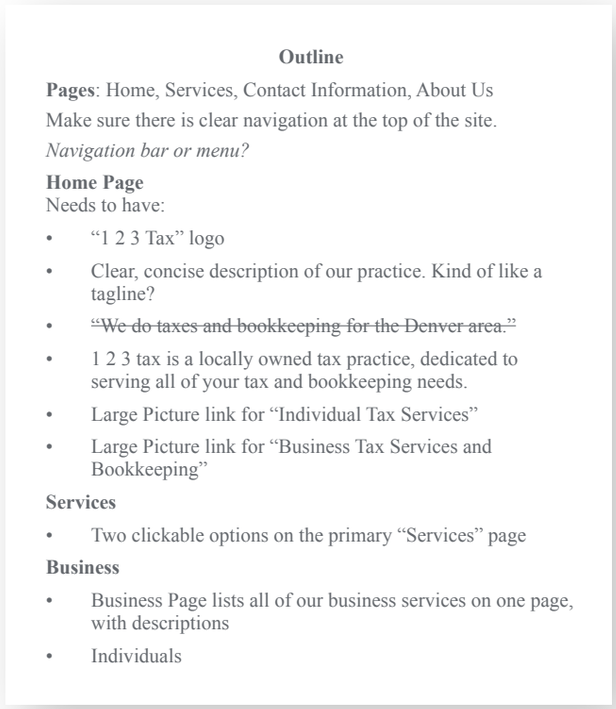
6-8 of the requirements: You've got some important elements of your site that need your attention. Plan out some time over the next few months to get your website up to standard.

5 or fewer requirements: It's time to make a serious investment in improving your site. Use this section to help you come up with a plan for a new site and work to get it up and running as soon as possible.

Website Building 101

Preparing your site's content

Avoid the temptation to try to do everything yourself to save a few dollars. The quality of your website will affect your business for years to come. Hiring an expert to help you get your website content right the first time is an investment that will quickly pay for itself.



Outline

Pages: Home, Services, Contact Information, About Us

Make sure there is clear navigation at the top of the site.

Navigation bar or menu?

Home Page

Needs to have:

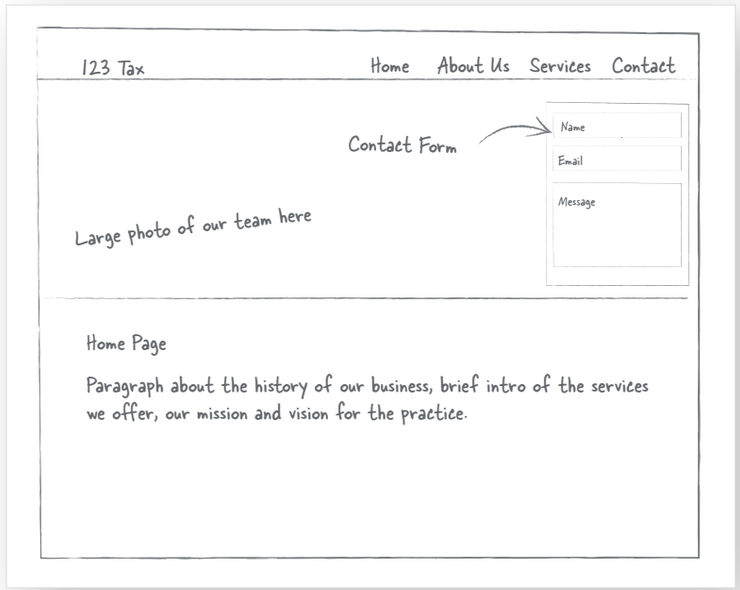
- "1 2 3 Tax" logo
- Clear, concise description of our practice. Kind of like a tagline?
- ~~"We do taxes and bookkeeping for the Denver area."~~
- 1 2 3 tax is a locally owned tax practice, dedicated to serving all of your tax and bookkeeping needs.
- Large Picture link for "Individual Tax Services"
- Large Picture link for "Business Tax Services and Bookkeeping"

Services

- Two clickable options on the primary "Services" page

Business

- Business Page lists all of our business services on one page, with descriptions
- Individuals





1. Outline the information

Start by creating an outline of the information you would like to include. Once you've written it all out, go back through and challenge yourself to make everything half as long and twice as simple.

2. Sketch out your idea

Create a simple sketch of how your outlined information would look on a website. Make sure your sketch will be doable within the development approach you choose (read about choosing a development option on page 11).

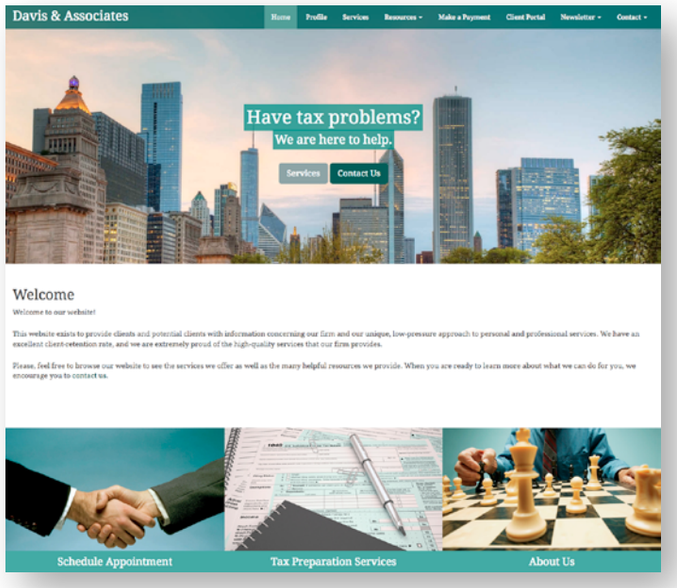
3. Hire help

Search online (try upwork.com) for a Freelance Copywriter to take your outline to the next level. This should cost you around $50–$75/hour, and should not take more than a few hours. A designer can be found the same way and for $30–$50/hour.

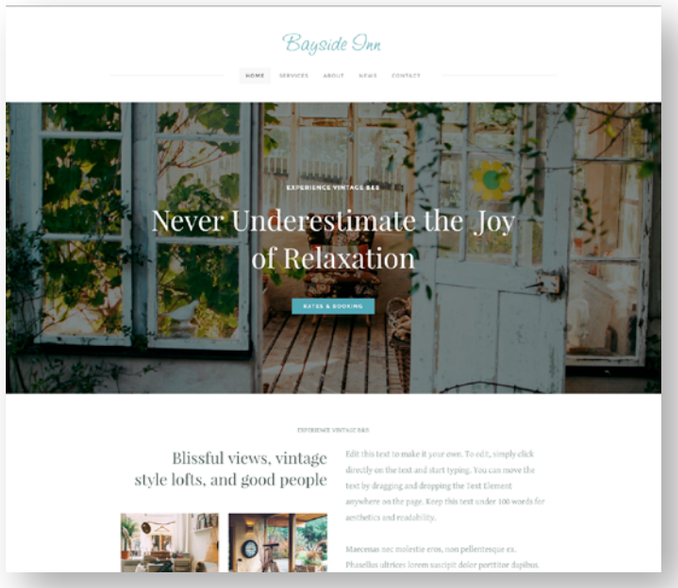
Choosing a development approach

For this decision, you'll need to decide what you're willing to pay, and how much time and energy you're willing to invest. We've detailed three common approaches in the following pages, ordered from easiest to most hands-on.

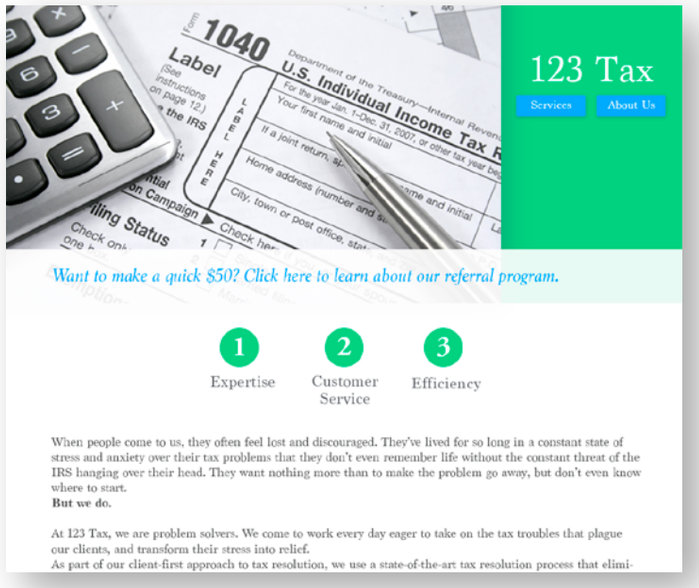
GetNetSet



Drag-and-Drop Sitebuilder



Custom Website Design



Choosing a development approach

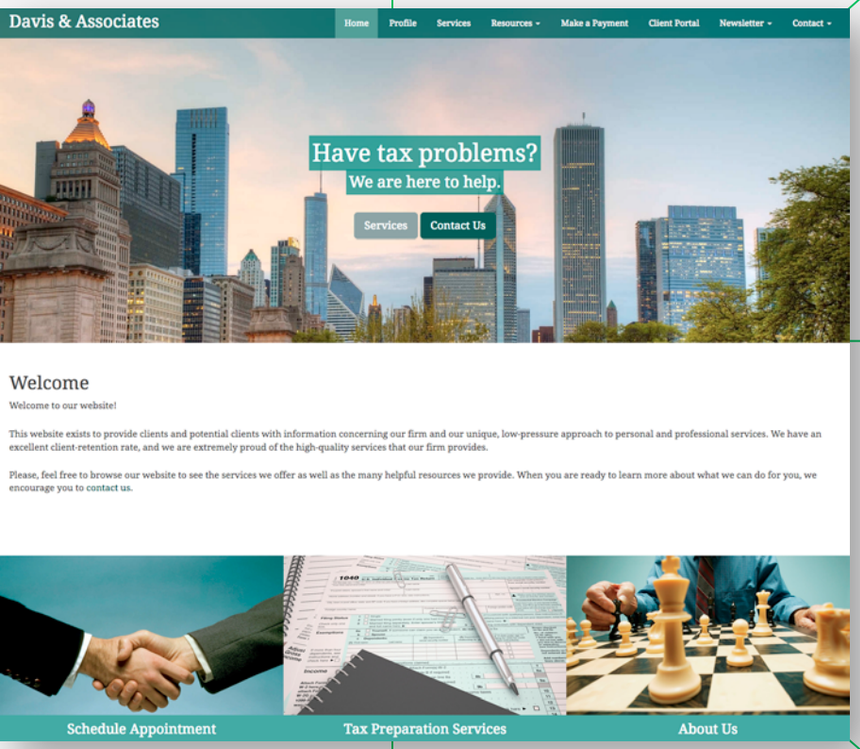
GetNetSet

GetNetSet is an industry-specific site building service for tax pros. Similar to the DIY site building options (covered next), GetNetSet's websites are template-based, but they provide a few distinct advantages over DIYing your site. The two biggest advantages of using a GetNetSet site are in ease of setup (they do it all for you) and their tax-specific features like a tax resource center, financial calculators, and tax newsletters.

Provider: www.getnetset.com

Difficulty
Easy as it gets.

Cost
$360–$1,200 per year



Time
Low to Moderate

Cons

1. Template-based sites will never feel entirely unique.
2. Templates aren't as up-to-date as some DIY options.
3. Feature-rich packages are relatively expensive.

Pros

1. Minimal time investment
2. Easy—GetNetSet will set up the whole thing for you
3. Dozens of customizable template options
4. Tax-specific tools available
5. You can't screw this one up

Choosing a development approach

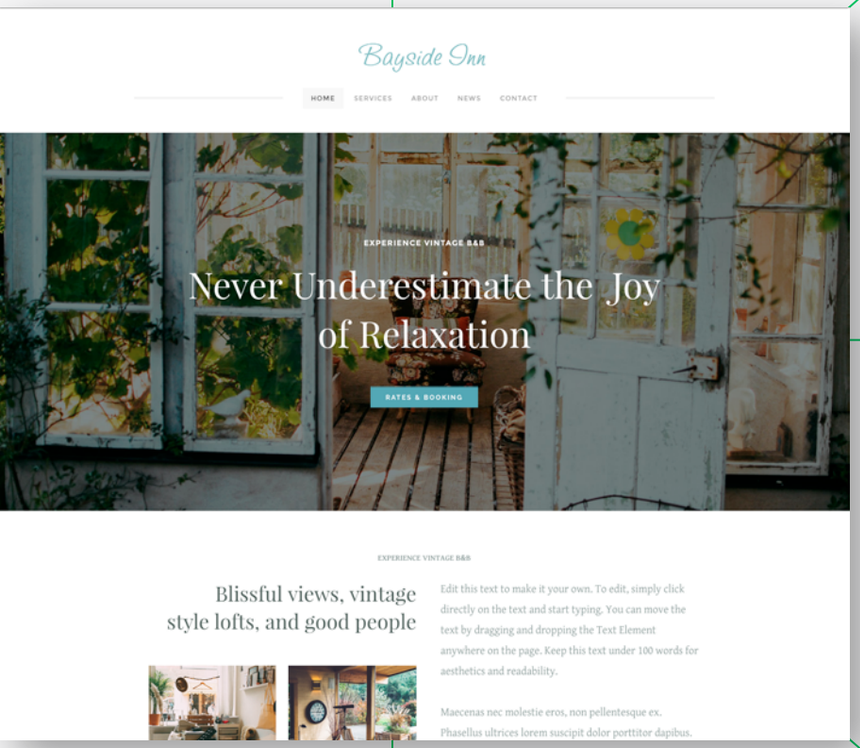
Drag-and-Drop Sitebuilders

A drag-and-drop website requires little to no coding, but putting it together will still require a fair amount of your time. Using a template will help you choose things like font, page layout, and color schemes, but you'll still be responsible for compiling and inserting your own graphics and copy. If you consider yourself technically challenged, this may be a more challenging project than you want to tackle on your own.

Providers: Weebly, WIX, Squarespace, and more.

Difficulty
Intermediate

Cost
$10–$30 per month



Time
Moderate to High

Cons

1. Time-intensive
2. Site will look similar to many others
3. No easily integrated tax tools
4. Site maintenance is all up to you
5. Final product can be terrible if not well done
6. Limited flexibility

Pros

1. Low cost
2. Simple setup
3. Dozens of options
4. Easily customizable
5. Final product can be great

Choosing a development approach

Custom Website Design

Hiring a custom web designer is not the best option for all small tax practices, but don't reject it just yet. Buying a custom website is a little pricey up front, but since you are purchasing a site design—rather than leasing a template—the long term cost is less drastic than it might appear at first.

There are a few good reasons to invest in a custom website. Some practices need a highly customized site to accommodate the needs of their clients, and others want a site that is professionally designed and visually stunning. Practices who provide those kinds of premium experiences typically charge corresponding premium rates for their services.

If you decide that a premium, custom designed website is what your business needs, consider starting your search for a web developer at a site like Toptal.com.

**Hosting fees will vary quite a bit depending on the average size of your webpages and your average web traffic.*

Basic, shared server hosting: $5-$25 per month.

Wordpress.org optimized hosting: $25-$150 per month.

Dedicated server hosting: $125-$250 per month.

If you're sure you want a custom website, use the information on this website to estimate your hosting needs.

Difficulty
Intermediate

Cost
$5,000 and up (one time), plus hosting fees*



Time
Moderate

Cons

1. Upfront cost may be prohibitive
2. Substantial updates to the site will be expensive
3. You'll be responsible for managing creative talent

Pros

1. Unparalleled customization
2. Best possible final product
3. You can be as involved or hands off as you want
4. Option to add any feature your budget can withstand
5. You own the site, rather than leasing a template

Making Your Site Easy to Find

In marketing jargon, making your site easy to find through search engines like Google is called search engine optimization (SEO).

Here are three simple things you can do to make your website easy to find:

1. **Use keywords frequently on your website.**
   These should be words you think potential clients are using to search for professional help. For example, tax pros who focus on tax resolution should include keywords such as “IRS,” “tax resolution,” “tax trouble,” “offer in compromise,” “tax penalty,” “tax relief,” etc.

2. **Make your content easy to share on social networks.**
   Part of the recipe of strong SEO is the number of links that lead back to your website—including links in social media posts.

3. **Insert internal links.**
   Linking each page to other pages on your website doesn’t just make it easier for visitors to navigate your site, it also makes it easier for Google to analyze your site, which in turn improves your search rankings.

If you want to dig deeper into SEO, The Beginner’s Guide to SEO is a great place to start.

03

Online Reviews

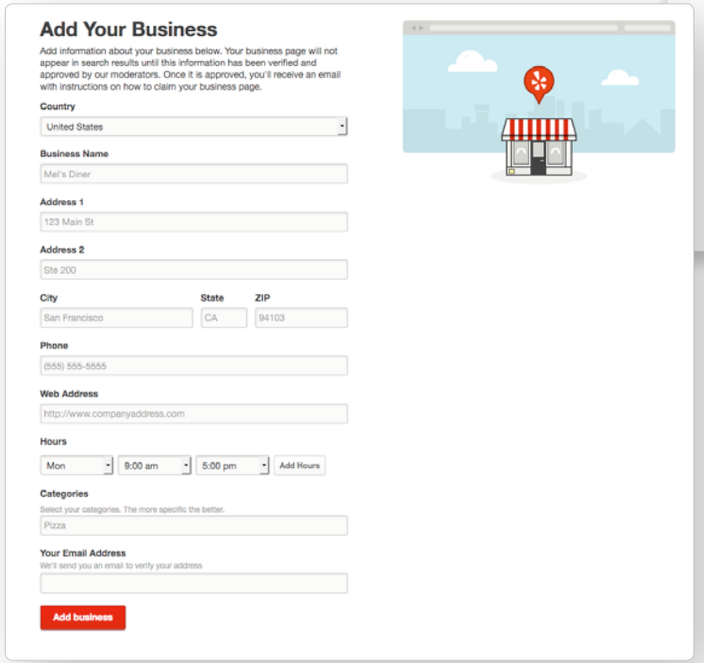
As many as 88% of consumers say that online reviews have an impact on their purchase decisions.

Which means that people are going to review sites specifically to search for reputable tax pros to work with. And, if that isn't convincing enough, results from Yelp and Google My Business are usually listed at the top of local searches—right where you want your business to be.

Setting Yourself Up for Success

Before you can start reaping the many benefits of review sites, you have to create (or update) your Yelp and Google My Business listings. Don't worry, it's easy and free.

Click to List Your Business on Yelp

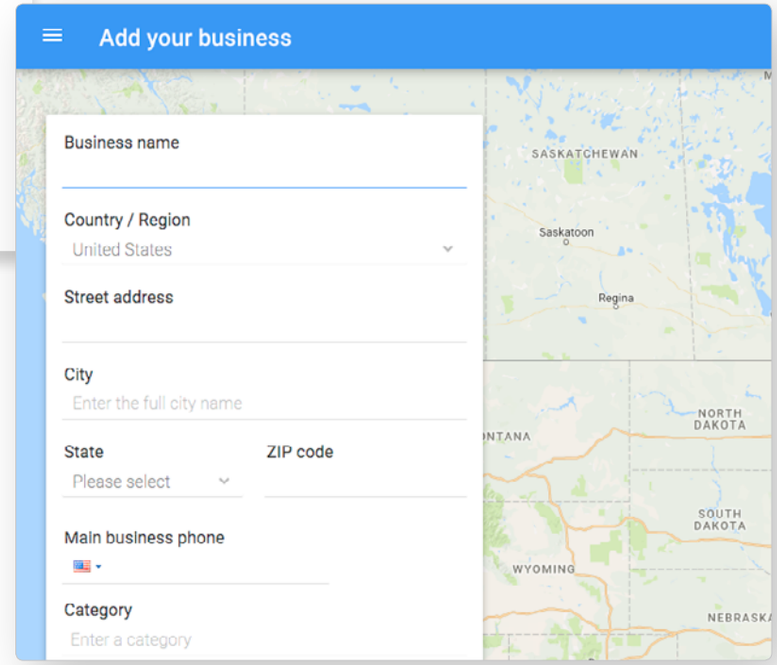


Listing Your Business

You'll need your:

- ✓ Business name
- ✓ Address
- ✓ Phone Number
- ✓ Web Address
  (eg. www.TheNameOfYourSite.com)
- ✓ Office Hours
- ✓ Business Category
  (Enter "Tax" or "Accountant" into the entry field and choose from the dropdown menu.)

Click to List Your Business on Google My Business



Managing Your Online Reputation

Though you won't be producing the content on review sites, there is plenty you can do to manage your online reputation.

Responding to Negative Reviews

By listing your practice on review sites, you are opening the possibility of receiving negative reviews.

And that's okay. Don't stress too much over a couple of negative reviews. Instead try one of the following ideas:

1. **Respond professionally to the review.** Many negative reviews can provide insight as to how you can improve your services if you're willing to listen.

2. **"If you can't say something nice..."** Sometimes—especially if the review is upsetting—it's best to just let it go rather than trying to respond. A lack of response will look far better than a response that is unprofessional.

3. **Flag the feedback as inappropriate.** If the review violates site guidelines, you can request to have the review removed. A quick word of caution: don't do this lightly. Flagging negative reviews that don't actually violate site guidelines may seriously damage your professional credibility.

Encouraging Positive Reviews

If you really want to take control of your online reputation, you'll need to encourage your clients to leave positive reviews of your practice.

✓ **Do:** Provide exceptional service. When your clients sit down to write their review, you want them thinking good thoughts about their experience.

✓ **Do:** Ask for reviews. You can do it in person or over email, but it likely won't even cross your clients' minds to leave a review unless they're prompted.

✗ **Don't:** Incentivize reviews. Offering discounts or cash incentives for positive reviews is more or less universally considered unethical. If you get caught doing it, your business reputation could suffer irreparable damage.

If Yelp Makes You Nervous

There have been some allegations regarding the way Yelp handles reviews for business owners who choose not to advertise on Yelp. If you're concerned about using Yelp in light of these allegations, consider the following:

Yelp is not a *vital* platform for your tax practice.

Yelp doesn't hold as much sway in the financial services industry as it does in industries such as food services. Ignoring Yelp won't help your business grow, but it may not hurt much either. However...

Yelp won't take your business listing down.

Even if you don't want to deal with Yelp, you should at least take the time to make sure the information on your listing—hours, location, phone number, etc—is accurate and up to date.

04

Social Media

Think social media is just for young people? Think again.

Baby boomers are more than 2x more likely to interact with businesses on social media than millennials.

And thanks to social media, getting your business in front of interested customers—of all ages—has never been easier or more effective. In fact, 65% of American adults were using at least one social media platform by 2015.

But the social media revolution has also complicated things. There are now so many options that it can be hard to know where to even get started. In this chapter, we'll un-complicate it for you, and walk you through a few simple ways you can start your social media marketing efforts.

Deciding Where to Invest Time

When it comes to marketing for tax pros, the answer is relievingly simple: **Facebook.**

Why Start with Facebook?

1. Facebook is widely used, which means you're likely already familiar with it. Even if you're not, Facebook is easy and intuitive to learn.

2. Facebook Business is a very approachable platform. It's designed to be simple enough for business owners to manage without the need to hire a professional marketer.

3. Facebook is an incredibly powerful marketing tool. Over 50% of consumers say that what they see on Facebook influences online and offline purchases.

Setting Up Your Facebook Business Page

If you already have a Facebook business page, great! If not, creating one only takes a few minutes.

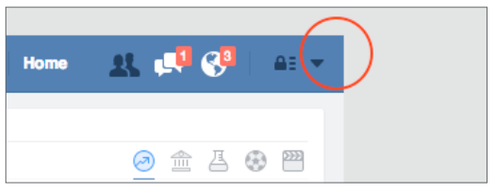
Here's how to get started:

Create a Facebook Business Page

- ✓ Go to this link: **Set Up a Page**

  -or-

- ✓ From your personal Facebook page, open the settings dropdown menu and select "Create Page"



- ✓ Click the "Local Business or Place" title
- ✓ Input your practice's info—business name, address, phone number, etc.

Facebook Business Best Practices

The primary benefit of using social media is the ability to interact with your followers directly.

A successful Facebook page will provide ongoing value and nurture positive relationships with your followers. Here are 6 things you can do to make sure you're using your Facebook page to make a positive impression with your followers:

Posting

1. **Keep followers up to date.** Post about relevant events, deadlines, law changes, etc.
2. **Keep followers informed.** Share articles relevant to your customer base.
3. **Reward your followers.** Promotional posts should be in the minority (30% or less), but when you do pitch your services, make sure to reward your followers with a discount, or some exclusive added value.

Don't have any followers yet? *No worries. Start by reaching out to your current clients—through email or in person—to let them know your practice is now on Facebook.*

Interacting With Followers

1. **Interact consistently with followers.** Set time aside each day to answer questions and respond to other comments.
2. **Make a plan for interacting.** Have answers ready for common questions. Don't hesitate to use outside resources (such as the FAQ page on your website) when people have complex questions.
3. **Be cordial.** Your Facebook page is a public record of your interactions with your followers, many of whom are clients or prospective clients. Don't do or say anything here you wouldn't want the world to see—because they will.

Sound overwhelming? *Consider outsourcing your social strategy to a third party, such as TaxProMarketer.*

Further Reading

A deeper dive into Facebook Marketing

Marketing on Twitter

05

Referral Business

You've heard that word-of-mouth is a powerful marketing tool.

And it's true: 82% of Americans ask family and friends for advice when considering a purchase, and 92% of Americans say they trust recommendations from people they know.

So it's clear that an overwhelming majority of Americans value referrals highly, but how is a small business marketer supposed to harness that power?

By asking for and incentivizing referrals.

According to a 2016 Harris Poll, 88% of Americans say they would like some kind of incentive for recommending a business to their friends, and 77% say they would specifically prefer a cash incentive.

Let's take a look at how you can go about soliciting referrals from clients and tax professionals to grow your tax practice.

**Though we focus primarily on tax resolution referrals in this chapter, the same principles can be successfully applied to any service you offer.*

Client Referrals

If you have clients, you already have a lead-generating goldmine.

Offering a cash incentive for referrals can be particularly effective when applied to your tax resolution services. Since tax resolution typically commands high rates, offering substantial incentives is attractive for your clients and a high-return investment for you. **You might advertise this type of referral program with something like this:**

Want to make a quick $50?

1 2 3 Tax will give you $50 for every client you successfully refer, and another $50 to your referral. If you know anyone who needs tax help, give them our card. When they choose to sign on as a client, we'll give each of you $50. It's that simple.



You can find this referral template plus more in our free Marketing Templates package.

Client Referrals

Once you have a referral program in place, make sure to remind people about it frequently.

Consider displaying information about your referral program:

- On fliers to give to each client as you begin working together, and again when you close the case out.
- On your website.
- On your blog (perhaps in the form of a case study about a successful referral).
- In an email newsletter.
- On a sign or poster in your office.

Whatever you do, don't assume people will just refer their friends and family without being prompted.



Professional Referrals

Many of your peers don't have any interest in doing tax resolution themselves, and are happy to refer that work to a tax pro they trust. Or maybe you don't do tax resolution, but know a tax resolution specialist who has to turn down bookkeeping clients because they don't have the time. If you can fill the needs of other tax professionals, you will have a constant stream of new business flowing from the other practitioners in your community.

Referral arrangements between professionals can be incentivized with either a flat fee incentive, or a percentage of profits from the referred case. These agreements also usually include a discount for the referred client.

Here's an example of one such proposal:

New Message

To: *Amy@acmetax.com*

Subject: *Client Referrals*

Dear Accountant Amy,

It was great talking with you over drinks at the Chamber of Commerce social the other night. I wanted to follow up on something we discussed.

You mentioned that you might be interested in sending some of your clients my way when they need tax resolution services. I would be happy to pay you 5% of the cost of the first case for each referral you send (I generally charge between $2,000 and $5,000 for a standard tax resolution case). I'll also discount my initial consultation for anyone you refer, from $300 to $200.

If this works for you, I'll bring by a stack of my business cards later this week.

Looking forward to working with you,

—James
CPA at 1 2 3 Tax

Send

Further Reading

7 more tactics for attracting referrals.
How to perfect your proposal pitch.

06

Email Marketing

Email marketing is one of the most powerful marketing tools at your disposal.

In fact, according to emailexpert.org, the average income generated for email marketing in 2014 was $44.25 for every $1 spent!

It turns out that people actually *like* getting marketing messages in their inbox: 95% of people find opt-in emails useful, and 91% check their email at least once per day. So whether you want to use email as a tool to market your services to potential clients, or you just want to keep in touch with your current clients, email marketing is a great place to focus your marketing efforts. In this chapter, we'll help you set your goals for email marketing, choose an email software to use, and share some best practices to help guide you along your way.

Starting Out Simple

As with other marketing mediums, the first step toward successful email marketing is to determine what success looks like to you. Email marketing has near-limitless potential, but that means it can be easy to get in over your head.

If you're not sure where to start, we suggest you start with a simple goal: growing your business through your existing contact list.

Choosing an Email Software

If you want to launch a successful email marketing campaign, you'll need the help of a good email software. Even if you only have a few dozen email addresses currently on your list, the dedicated email marketing softwares we talk about in this chapter provide a whole host of benefits you can't get by BCC-ing your client list in Outlook. On top of handy things like automation and detailed metrics, these softwares also ensure your emails are compliant with privacy laws.

The good news is that email marketing software is simple to use and doesn't have to be expensive. However, as you might expect, you will get the level of service you're willing to pay for. If you want to spend the least amount of time writing and designing your emails, consider spending extra for a more comprehensive email solution. Let's look at two different email marketing services.

Choosing an Email Software

TaxProMarketer

www.TaxProEmailMarketing.com

TaxProMarketer is an industry-specific email service. They handle all the logistics required to be successful at email marketing—list management, coordinated email blasts, unsubscribes, etc.—but they don't stop there. TaxProMarketer actually writes emails full of information your clients will find useful. They send these nurturing emails weekly on behalf of your practice, freeing you up to focus more time on tax work. If you have a bit more time to spend on email marketing you can also choose to customize the text of the weekly email—something you should absolutely consider—to make sure it fits the needs of your practice each week.

TaxProMarketer does more than just email marketing. They're a one stop shop for tax pros who want to outsource their digital marketing. Check out their full offering at taxpromarketer.com.

Difficulty
Beginner

Cost
$197 to $297 per month.

Time
Low to Moderate



Pros

1. Saves you a ton of time
2. The product of years of expert email marketing experience put to work for you
3. Provides customizable content

Cons

1. Time spent personalizing the weekly emails may defeat the primary time-saving benefit you are paying for
2. Expensive compared to DIY options

Choosing an Email Software

MailChimp

www.mailchimp.com

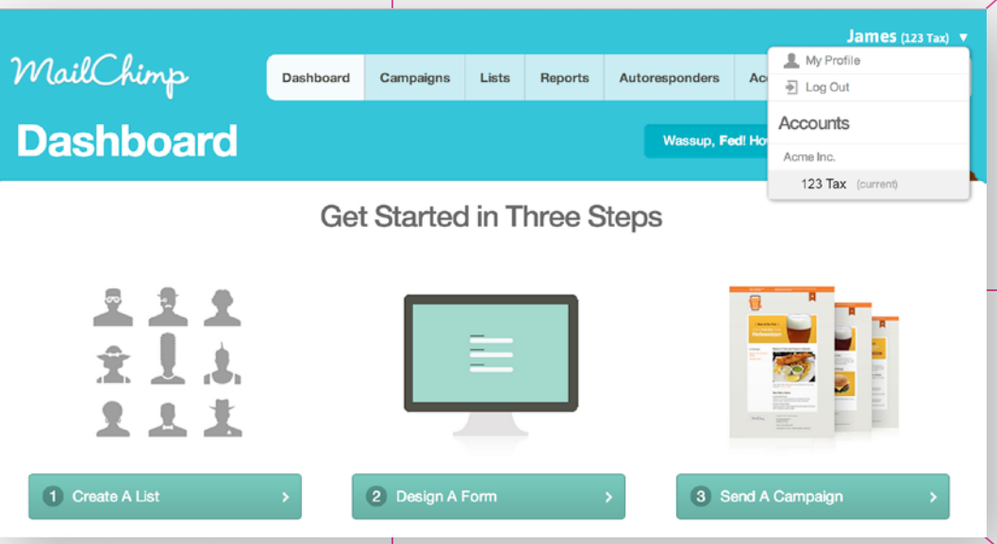
Mailchimp is one of the most popular email marketing softwares for small- to medium-sized sized businesses. Their DIY email marketing software allows you to schedule emails and send them to your entire contact list simultaneously. It also lets you design emails visually (with or without the aid of templates), manage your contact list (or lists), track important statistics, as well as managing unsubscribes.

If you use MailChimp, you will be responsible for providing all content for your emails, as well as the design and scheduling. Mailchimp is a good option for tax pros who want complete control over the content of their emails—whether you write it yourself, or hire a copywriter to do it for you.

Ready to get started with MailChimp? Start by watching this video tutorial.

Difficulty
Intermediate

Cost
Free to $50 per month if you are sending emails to 5,000 people or fewer.



Time
Moderate to High

Cons

1. Designing emails and producing content are time-intensive tasks
2. Writing good emails is a skill that takes time to learn

Pros

1. Low cost
2. Gives you the most control over content
3. Easy access to important statistics

Email Best Practices

Give your list a dozen good reasons to open your emails every time they land in their inbox.

If you decide to go the DIY route—or want to customize TaxProMarketer's weekly emails—there are a few things you'll want to keep in mind as you set up your email marketing campaign.

Set expectations.

Let people know from the beginning how often you are going to email them—typically either weekly or monthly—so they know what they're signing up for.

Write compelling subject lines.

One of the best ways to increase your open rate (the percentage of people who open your email) is to write better subject lines. In fact, 35% of people open emails based on the subject line alone. Check out the tips in this Hubspot article to become a subject line genius.

Provide value.

Similar to social media (CH 4), email marketing is all about building relationships with your list. That relationship has to be give and take in order for it to work. The key to creating valuable emails is focusing on useful content such as tips, guides, and how-tos for your clients. Give your list a dozen good reasons to open your emails every time they land in their inbox (see the Additional Resources section of this chapter for a guide on exactly how to do this).

Email Best Practices

Sell relevant things.

Just because your emails shouldn't *primarily* focus on selling doesn't mean you should never use your emails to sell. If a person is getting regular emails from you, it means they trust you and would prefer to do business with you if you can fill a need. So tell people about your services. Remind them of all the different things for which they need your accounting expertise. And of course, always include a call to action that explicitly encourages the reader to take the action you want (sign up today, call us to schedule a consultation, book your appointment now, etc.)

Send welcome and confirmation emails.

When someone is added to your contact list or schedules a consultation, thank them. Automated welcome and confirmation emails are easy to set up in an email marketing software, and can make a big impact on your clients. There is no faster way to lose the interest of a potential client than to do nothing after they have used your services in some way. Sending a welcome email is a perfect opportunity to start building a lasting connection with a new client that will bring them back to your business over and over again.



Advanced Email Marketing

Some of you out there are a bit further along and are eager to use email to do more than market to your current list of clients. You want to actively grow that list and improve your email marketing strategy to deliver every possible cent of value.

You want the advanced stuff: subscribers, newsletters, landing pages, gated content, drip campaigns, segmentation, and more.

While those concepts are outside the scope of this Marketing Basics ebook, we can give you a few places to start:

Advanced Email Marketing Sources

- Overview of Advanced Email Marketing
- Getting Started With Landing Pages
- The Ultimate Guide to Lead Capturing
- Automation and Drip Campaigns in MailChimp

Happy emailing!

Additional Resources

Common Rookie Mistakes in Email Marketing

A Beginner's Guide to Successful Email Marketing

A Guide to Writing Great Copy For Your Emails

How to Consistently Write Irresistible Subject Lines

07

Paid Digital Advertising

Paid advertising has the potential to expand your marketing reach in a way no other method can consistently match.

Paid digital advertising, like PPC (pay per click) campaigns, is one of the best ways of getting your business' name to potential new customers. With the wealth of information that comes from paid digital advertising analytics, it's easy to track your ROI and make changes based on real data that will improve your bottom line. In this section, we'll go over the fundamentals of paid digital advertising and how you can start running paid ads right away—without hiring a marketing team.

Easy Advertising on Facebook

There are dozens of platforms for digital advertising, but the two undisputed leaders are Google Adwords and Facebook. Both advertising platforms are extremely effective, but Facebook's interface is far more intuitive, so that's where we're going to help you get started. These ads will widen your marketing reach, and help you learn how to hone in on your target market.

Even if you're more interested in Adwords, stick with us. The principles you'll internalize as you learn how to put together a successful Facebook ad campaign will lay the foundation for your understanding of Adwords.

Planning Your Facebook ad

Before you even log into Facebook, you need to plan out what you want your ad to accomplish. Do you want to drive more traffic to your website? Do you want people to follow your Facebook page? Do you want people to call your office directly after seeing the ad?

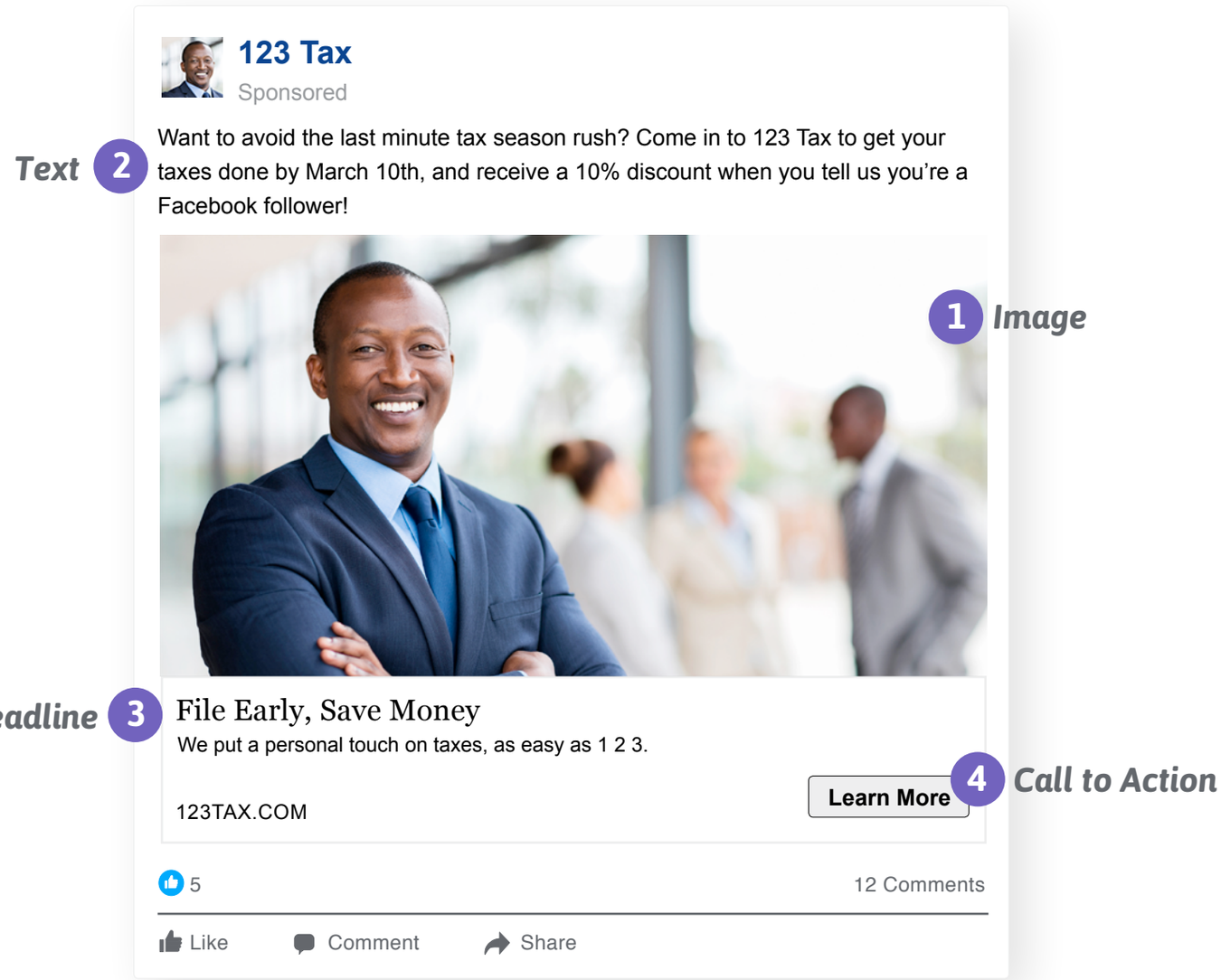
If you're not sure what outcome to choose, we suggest increased website traffic as the goal of your first ad campaign—but only if you've optimized your website as we discussed in Chapter 2.

Check out Facebook's image guidelines and suggestions right here.

The Anatomy of a Great Facebook Ad

Now that you've determined the desired outcome of your Facebook ad, let's take a look at how you'll turn your idea into a reality.

Your Facebook ad will consist of four main pieces that need to be designed:



Let's take a quick look at each piece of the ad and how to optimize them.

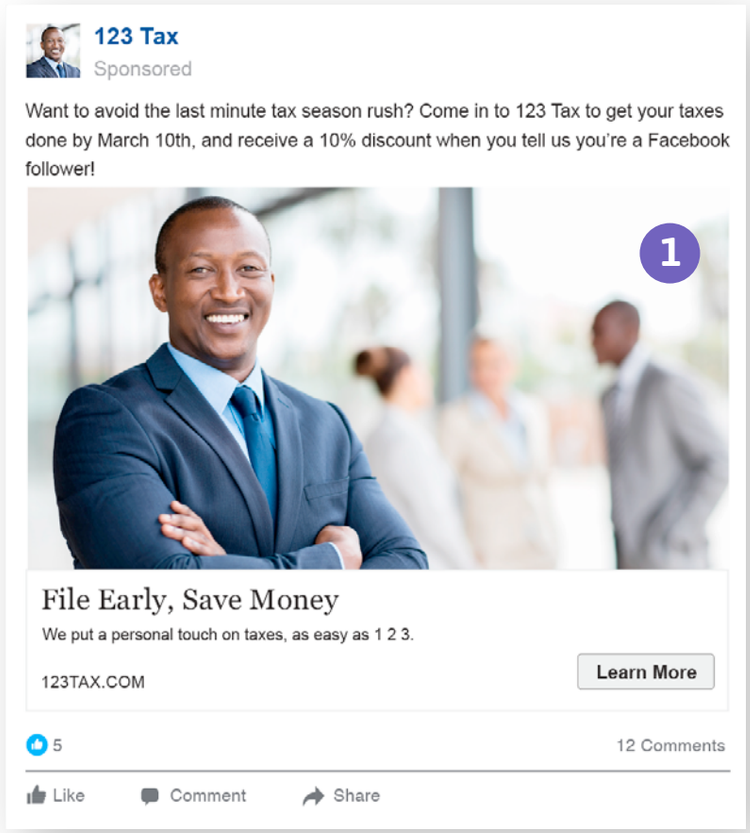


Image 1

How important is the image in your Facebook ad? According to Consumer Acquisition, they are responsible for 75–90% of Facebook ad performance. Because the image is so vital to the success of your ad—and trying to anticipate the preferences of the market can be nearly impossible—Consumer Acquisition suggests that you test 5–10 ads simultaneously*, with the image as the only variable. "Don't be surprised if a lot of the images you test fail out the gate," they advise. "That's good—that's the market giving you feedback and guiding you to the winning formula. It's the market saving you money, by quickly providing a referendum on images that won't work."

Image Ideas

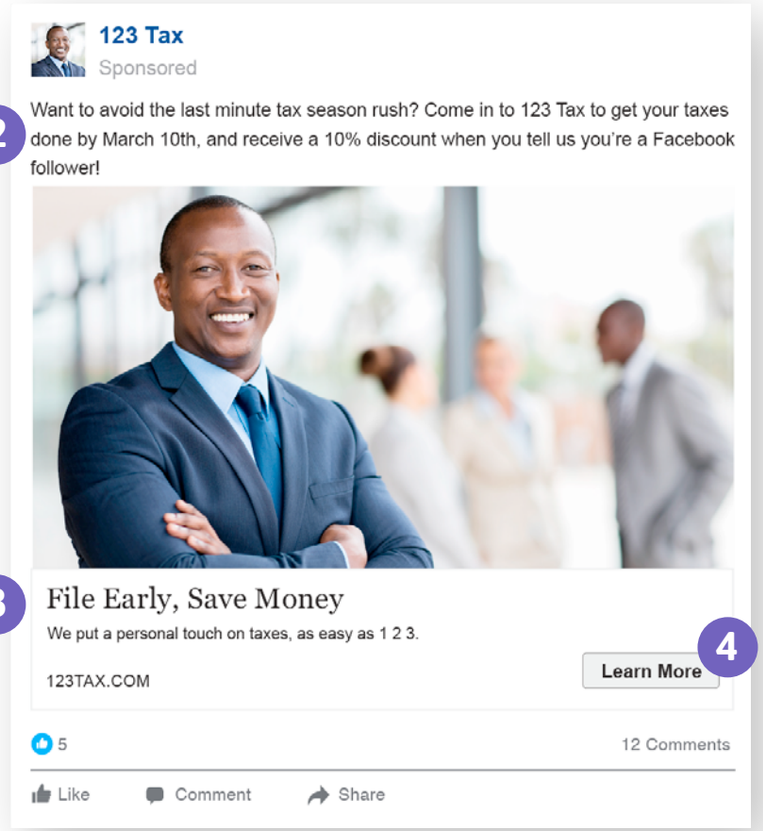
Free

- ✓ Take a photo of yourself in front of your business.
- ✓ Take a photo of your staff at the office.
- ✓ Take a photo of a happy customer (after obtaining permission).
- ✓ Use free stock photos. We like rgbstock.com.

Better Quality

- ✓ Buy a package of high-quality stock photos. We like istock.com.
- ✓ Hire a freelance designer to put together graphics and photo ads. (Try sites like fiverr.com, upwork.com, and toptal.com to find a freelance designer that fits your budget.)

**Don't let this scare you. This should take a few hours, not a few days. Keep in mind, you're not trying to make 5–10 perfect ads. You're picking 5–10 pictures and watching how each one performs.*



Text 2, Headline 3, and Call to Action 4

As important as images are for your for ad, the headline and the body text of your ad still need your attention.

Facebook ads should:

- **Be brief, but descriptive.** People have short attention spans when they're scrolling through Facebook. Make sure people can tell immediately what you are advertising. If you're vague, you'll lose their attention.
- **Offer value.** What are you offering your viewer? Why should they click on your ad and abandon pictures of their friends' babies? To show value, you can offer discounts or deals, or you can imply value by creating urgency or using value-centric language.
- **Include a call to action.** Facebook includes a call to action button as a part of your ad, but strategically repeating a call to action in multiple places on the ad can improve performance.

The same principles of testing images also apply to finding the best headline and text. Once you have an image that works, test headline variations on that image and see which one performs the best. You should end up with two or three combinations that consistently outperform the others.

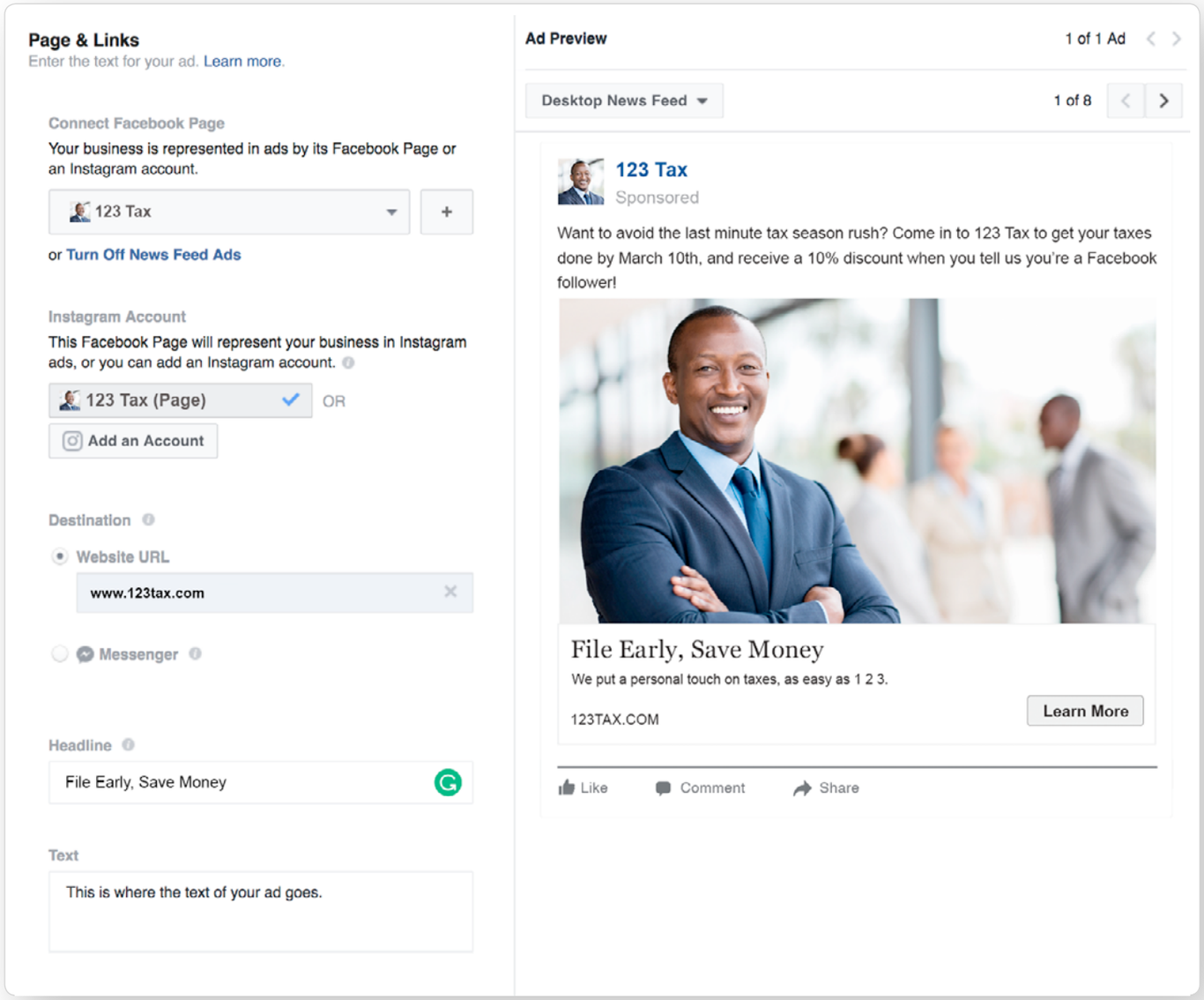
Further Reading

Headline writing formulas

Call to action strategies.

How to Set Up a Facebook Ad

Facebook has created a very simple, intuitive flow for setting up the ad that you've now planned. **Here's how that process will look:**



Setting up the ad is an extremely intuitive process, but Facebook has provided an excellent tutorial if you want some extra assistance:
Creating Facebook ads in Ad Manager

Tracking the Effectiveness of Your Facebook Ad

Digital ads can provide so much information that it can be easy to get overwhelmed by all the options. Unless you're planning to switch careers to digital advertising, we suggest that you stick to tracking a few simple metrics:

1. **Click Through Rate (CTR)**
   This is the percentage of people who click on your ad and land on your site. After a few weeks of tracking this number you should be able to establish a good CTR average for your ads. If any of your ads dips below that average for long (24 hours or more), it's time to replace that ad immediately (since poorly performing ads actually cost you more than high performing ads).

2. **New Clients**
   If you start driving new traffic to your website through paid ads, but you get little or no additional business as a result, it's time to make a change. Consider:
   - → **Altering the messaging on your ad.** Your ad may be unclear about what you're offering, causing people to come to your site with the wrong expectations.
   - → **Altering the messaging on your website.** Take a close look at the page your ad takes people to. Does it have a clear call to action? Is your contact information easy to find? Make sure your website is optimized to entice people to contact you.
   - → **Altering the call to action in your Facebook ad.** If you just can't get your website to convert visitors into clients, try asking people to call your office directly from the ad instead of going to your website.

3. **Return on Investment (ROI)**
   Spending money is an important part of advertising, but make sure that you are happy with your return on investment. If you're not, and you've followed the guidelines in this book to the best of your ability, it may be time to hire a marketing consultant or ad agency (such as Adroll) to help you get the most out of your marketing budget.

Further Reading

Learn how to apply your new skills to Google adwords.

Learn how marketing pros optimize their results with A/B testing.

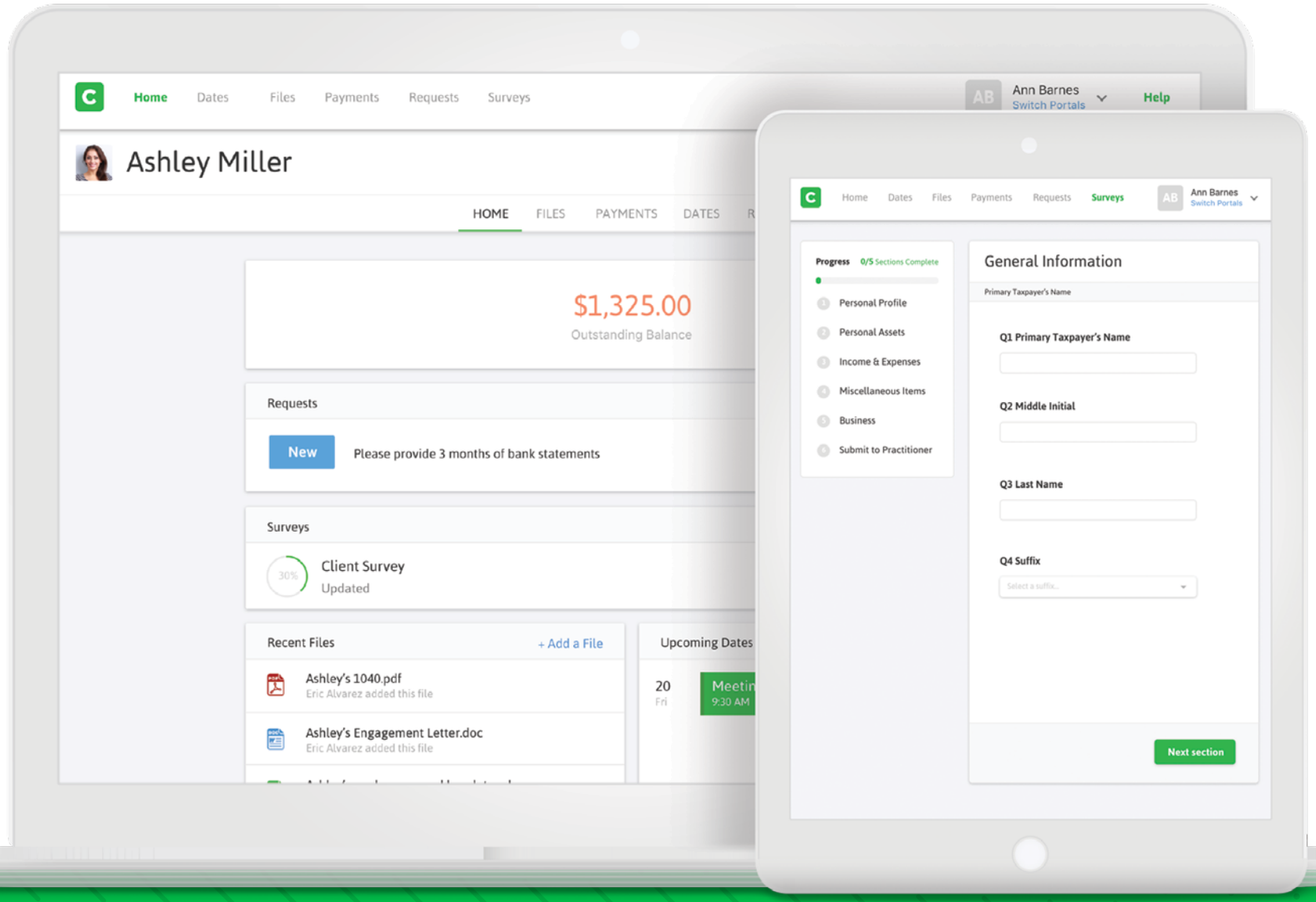
You've put in the study time, now it's time to put what you know to work.

So get out there and start marketing your practice! You have the tools and knowledge you need to successfully manage your marketing through your website, social media, review sites, referrals, email, and paid digital ads (and that's a lot of knowledge). As you put what you've learned into action, don't hesitate to revisit the tips and tools in this book often to refresh your memory and ensure that you're on the right track.



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