

Accounting firm marketing playbook



Marketing your firm and services to new and existing clients can be as simple as having a conversation. We've created this guide to help you have effective conversations with both new and existing clients, especially when it comes to BILL products.

You can use the tools in this guide whether your firm is large, small, or growing. We'll show you how to:



Identify the clients who are ready for your bill pay and spend and expense management services, and develop messaging to attract them.



Use a variety of marketing channels—each with its unique strengths—to effectively communicate your AP, AR, spend, and expense management services.



Build a marketing plan to maintain efficiency and achieve the desired results: engagement, conversations, and deals.



Engage in productive client conversations about your services and automation tools.



Step 1: Define your message

Marketing doesn't have to be uncomfortable. At its core, it's just communicating—and your words influence how someone feels about your product or service. So, what are you communicating about your offerings?

Once you've [established bill pay as a service](#), decide how to communicate the value of your offer. Clearly articulating value to your clients may be the most important step in the entire process.



1

Identify your ideal client

The key to a strong firm-to-client relationship is delivering value by solving key challenges. Your best bets (and easiest sales route) are often with established clients with pain points you can solve through automation.

Once you and your staff understand the pain points you're solving for, you have a foundation to better recognize ideal clients and opportunities to sell services.

So, what are common challenges? Almost any business can benefit from AP efficiency or spend management, but we've identified common challenges that BILL AP & AR and BILL Spend & Expense customers face.

Ideal clients for **BILL AP & AR** often have the following characteristics:

- Pay more than 10 bills each month.
- Experience frustration with delays in the bill pay process—for example, bills being missed, checks getting lost.
- Are currently disorganized, but have a desire for more efficiency.
- Are frequently missing papers and expense documentation.
- Want better cash flow management.
- Don't have a dedicated employee looking after their billing.
- Are growing too fast and need help managing back-office functions.

Clients who are ready for **BILL Spend & Expense** [look like this](#):

- They have grown past the start-up phase.
- Their employees use corporate cards for expenses.
- They regularly deal with reimbursements (travel, items for events, etc.).
- They spend money on ads or regular subscriptions.
- They regularly give their employees stipends or pay out bonuses or SPIFFs/SPIVs.



Our [client readiness checklist](#) can also help you determine whether a client is ready to switch to BILL Spend & Expense.

2

Create your top-level message

Sharing the word about your services is critical—but success will rely on how you communicate and the thought you put into it. This all happens before a conversation happens or an email hits an inbox.

You'll use your top-level messaging in all of your marketing and selling opportunities, from your emails to your clients to social media captions to conversations with clients. Therefore, it's important to develop a message that resonates with clients and staff.

Your message should answer the question: What are AP or spend and expense services and why do I care?

When you answer this question, your audience—whether they're existing or potential clients—should walk away understanding how the offer benefits them and what key pain points it solves for.

Ask yourself these questions when building your firm's messaging:

AP

- What is your firm's mission? How does AP relate to it?
- How does AP align with other services you offer? For example, AP is often considered the foundation of client advisory services (CAS), gathering valuable payments data for cash flow management.
- What will your firm deliver to clients (including the delivery of the actual service and its value)?
- Do you specialize in a specific vertical? And if so, what is your expertise in that niche? Do they have additional, industry-specific AP benefits to consider?
- For competitive wins, what factors closed the deal?

Spend & Expense

- What is your firm's mission? How does spend and expense management relate to it?
- How does spend and expense management align with other services you offer? What will your firm ultimately deliver to its clients?
- Are your industry specializations communicated, as well as how they relate to spend and expense management? What other areas of expertise does your firm have beyond that?
- When you have a competitive win, what factors closed the deal?

Example messaging

- We help our clients save time on accounts payable, gain financial control, and reduce risk, so they can spend more time running their business and make smarter, data-informed decisions.
- We use BILL Spend & Expense to reduce overspending, save time, and gain visibility into spend. An average client might save about \$600 per month using BILL.

3

Develop key benefits that support your top-level message

Clients want to know what’s in it for them. Make sure your messaging hits on the many ways automation eliminates time-consuming, repetitive administrative tasks, and how this translates into big time savings for them. Other key benefits to include:

- **Having the expertise of an accounting professional handling bill pay work end-to-end.**
- **Providing real-time visibility into cash flow and responsive advisory.**
- **Reclaiming hours of time spent on back-office tasks such as tracking due dates or reconciling receipts—and then putting that time toward growing their business.**

Here are a few examples:

Save Time

- **AP:** Tired of the tedious bill pay process? You can leave the entering, categorizing, and paying to us—all you need to do is tap “Approve.”
- **Spend management:** No more manual reconciliation or piles of paper receipts. Track all your spend in one place and in real time.

Ease of use

- **AP:** Automating bill pay is easier than you think. With our AP services and BILL, your vendors send invoices directly to us. You can review and approve, and we handle the rest.
- **Spend management:** Instead of combing through outdated, static expense reports line-by-line, view real-time spend from the palm of your hand with the BILL Spend & Expense app. Leave the receipts to us.

Reduce risk

- **AP:** Worried about blind spots and vulnerabilities with bill pay? We can enforce controls to help guard your money and sensitive information.
- **Spend management:** Reduce the risk of fraud and extraneous spending. We can consult on cash flow with real-time data.



4

Adapt your messaging for prospective clients

When you are trying to reach new prospective clients, you'll probably need messaging that's slightly different from what you developed for your existing clients. Prospective clients will be less familiar with your firm, services, and expertise, and will need a little more information to build trust and understanding.

Your current clients know and have come to trust you, but to a prospective client, you may just be another accounting firm vying for their business. What makes you stand out from the crowd? How does your new bill pay service fit into your broader firm vision and offerings? How are you representing your offers on your website? How do you show up on social media?

For example, you may want to create a landing page on your website just for new clients. Or one email to current clients may ask them to reach out to their accountant, but an email to prospective clients would encourage them to contact your firm to start the onboarding process.

Using the pain points and characteristics you've identified for your target client, you can create positioning statements aimed at bringing in new business. Here are some examples:



We are a full-service financial services firm that helps businesses save time and money through sound advice and the latest technology.



We offer cloud-based accounting services that allow our clients to focus on their business, not shuffling paper.



We are a virtual firm that specializes in freeing clients from labor-intensive back-office tasks.



Step 2: Get the word out

Once you have settled on a message, it's time to share it with your clients. There are many ways that you can do this, from a website to a blog to social media content. Some methods are more complex and time effective than others, but your firm doesn't need to do every one of them.

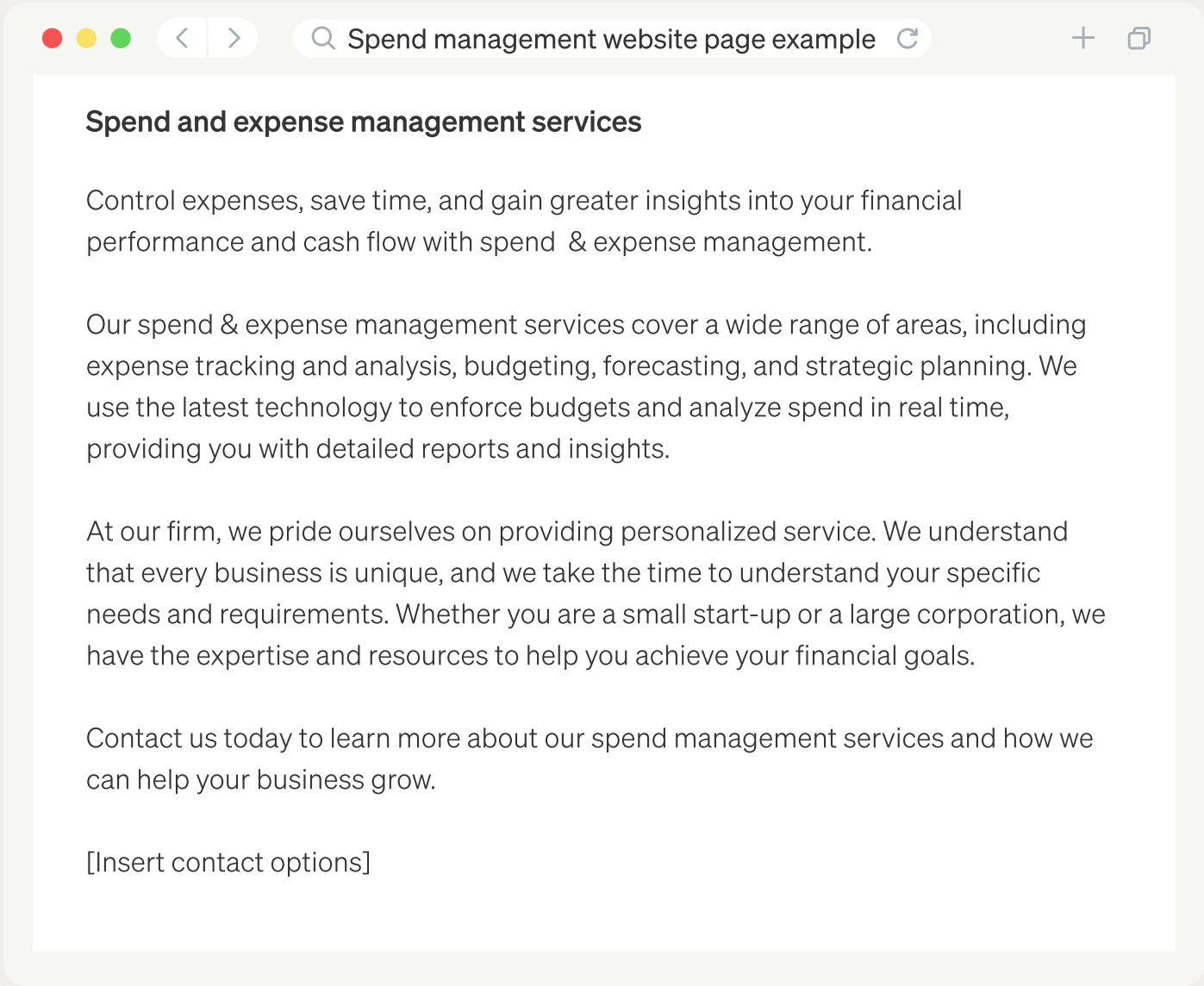
Pick and choose the channels—and how much effort goes into each channel—that'll be most effective for your firm based on the size of your firm, any bandwidth constraints, budget, and your clients.

If most of your clients operate in verticals that respond well to email but don't have much presence on social media, focus your time and budget on email. Consider who at your firm will be handling this outreach and what their workload looks like. Then make a plan for where you want to allocate your resources.

Marketing channels to consider—quick wins

Website

Use your website to promote your AP, AR, spend, and expense management services. Add a description of each service to your current services page or create a page for each one on your website. The information should offer visitors ways to continue the conversation, whether by filling out a form, providing contact information, linking to related materials, or enabling chat features.



Blog posts

Blog posts give you an online space to showcase your expertise and why your services are valuable to your clients and prospects. For example, consider blog posts that educate businesses on how they can manage expenses before money is spent, how to set up and maintain budgets, and the need to regularly analyze AP data to effectively forecast cash flow and ensure ongoing financial health. You can provide examples, case studies, and testimonials from your clients—showcasing ROI and business success.

These blog posts and your services page can provide a landing page for other marketing efforts, including emails and social media to help educate readers understand the need for spend and expense management and your firm’s ability to help them. Blog posts also often align with search engine optimization (SEO), a section of marketing that focuses on helping search engine algorithms direct visitors to your website. There’s more on SEO below.

Client newsletter

Do you have a client newsletter? If so, this is an ideal place to launch your new service and position yourself as a thought leader or expert in AP and spend and expense management without sounding too salesy. If you have a blog on your website, you can repurpose the content by sending it to your clients in a newsletter.

Email marketing

Email marketing delivers your messages to your audience’s inbox, making it an effective, inexpensive, and easy-to-measure process. Whether you are emailing clients from your work account, or using an online email platform, it puts your services right in front of them. Online email services will also help to ensure your emails comply with federal and state regulations, like providing a clear way to unsubscribe

Focus on email messages that speak to your recipients. For example, if you specialize in the dental industry, your copy will include pain points relevant to that audience. Sending a generic email to your entire list might not get the same traction as a list that targets your ideal AP clients or prospects or speaks to their industry.

Get tips on how to make sending emails a quick and simple task—plus a few templates you can use to begin crafting your own emails—in our [Accountant Email Marketing Guide](#).

Subject: Save 50% of time on accounts payable, with greater visibility and control

Dear [Client Name],

On a list of things you like to do, paying bills likely ranks somewhere near the bottom. Which is not surprising since it's time-consuming and prone to errors—especially if paper is involved—and fixing mistakes can be challenging at best. Not to mention the security and fraud concerns associated with sending checks in the mail.

Our firm can help save you 50% of time on accounts payable. As part of our partnership with BILL, you’ll see an immediate impact on your processes and business, including:

1. **Control:** Stay on top of your cashflow anytime, from anywhere with the BILL mobile app.

2. **Time Savings:** Focus on what matters to you while we handle bill management—we’ll alert you when there’s a payment to approve.

3. **Flexibility:** Pay international and domestic vendors how they want to be paid.

4. **Security:** Encryption of data in motion and at rest consistent with leading industry practices so you can rest easy.

Ready to focus more of your time on what matters to you and your business? If so, reply to this email or contact me at [contact information] to schedule an appointment.

Send

Reviews

An easy and free way to build your online presence is by setting up a [Google Business Profile](#) for your firm. Add your services, location, and geographic areas served. Consider highlighting your competitive differentiators as well. Once you have this profile set up, you can invite clients to post reviews of your firm. This, in turn, will help build more brand awareness and business for your firm.

Events

Events such as webinars, conferences, or networking groups offer great platforms for networking and marketing AP, AR, spend, and expense management services. You can explore sponsoring events and speaking opportunities that target your ideal clients (for example, industry meetings and conferences or partnering with local business groups). You can also pitch presenting at events such as these, offering educational, helpful discussions that open conversations up around AP, AR, and expense management.

Partnerships

Partnerships are a great way to get your message out to your audience without all the work falling on your shoulders. Consider partnering with businesses that can refer clients to you, such as insurance agencies, banks, or firms that don't offer AP or spend management services. Also think about partnering with a solution provider that may have programs in place to help you market your firm and your services. For example, BILL has a "Find an Accountant" directory for firms and offers partnership benefits to help firms grow.



Advanced marketing options

These marketing suggestions might take more resources and expertise to accomplish, but can be effective cornerstones of marketing your services.

Social media

The average American spends more than two hours a day on social media sites like Facebook, LinkedIn, TikTok, and Instagram. Tap into that free airtime by keeping your social channels up and running with posts. In general, posting 3–5 times per week is favorable, featuring items like blog posts, articles, advice, trends, and more.

It is feasible to handle social media on your own. However, it might be a good idea to focus only on a few options instead of every social media channel. For example, consider starting with LinkedIn, which has a strong business user base and offers many opportunities for firms to target them with ads, content, and posts. It can take time and effort to build an engaging social media presence, so it is often a responsibility that benefits from outsourced marketing resources or in-house experts.

If you do decide to pursue social media at your firm, here's our biggest tip: Don't just sell—share and educate. Consider other content your clients might find useful. Look to other blogs and resources, such as the [BILL blog](#), where you can find a number of articles focused on small businesses and more.

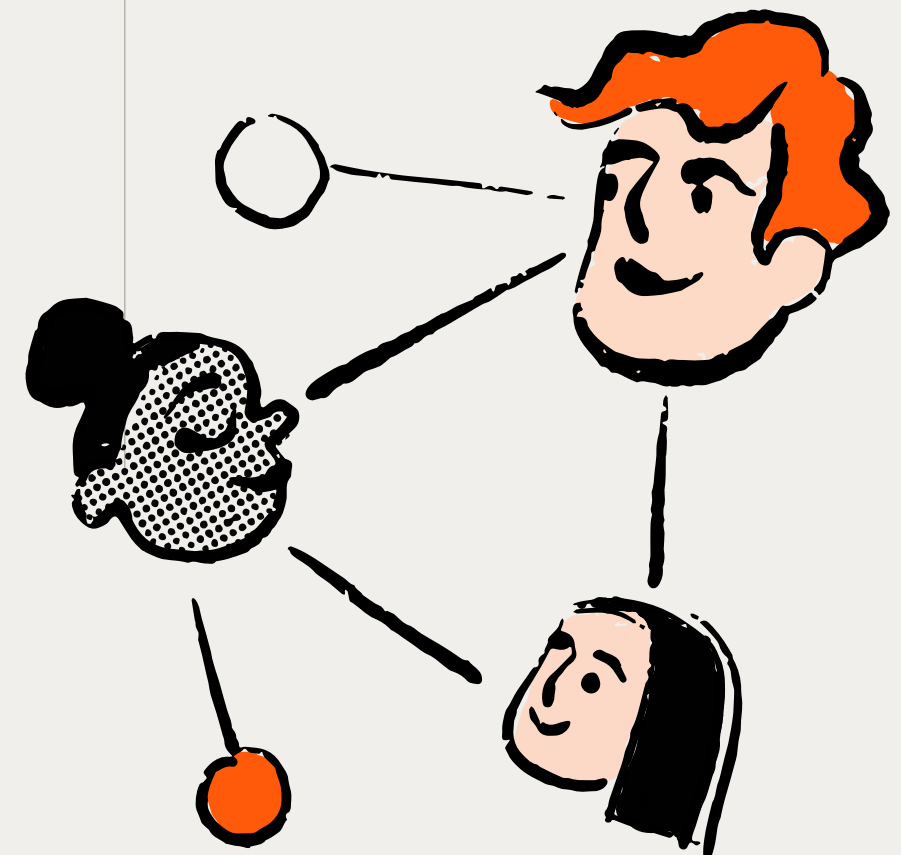
Here are some key DOs and DON'Ts to get you started:

✓ DO

- Consider using the 70-20-10 posting model. This means 70% of your content should add value to your readers and help build brand recognition, 20% of your content should be shared content from relevant sources (such as our blog), and 10% should be promotional content with clear calls to action.
- Post links to your blog content for your audience to consume and learn more about your firm.
- Interact with and engage your audience. Social media is about being social and will help build a comfortable, low-pressure atmosphere to connect with your firm.
- Use various types of media (pictures, video, gifs, etc.) to catch your audience's attention. Images and video greatly increase engagement, so take advantage wherever you can.
- Take the time to listen to the activity on the social media networks you've chosen. See what works, what people discuss, what they interact with, and what your audience needs before jumping in.

✗ DON'T

- Just repeat the same posts and content across the social networks you're involved in. Choose your networks based on where your audience is and then tailor your content to the expectations on that social media network.
- Just share sales heavy content. Consider sharing more thought leadership content to show your firm is up to date on the latest trends and industry news.
- Become 'just another accounting firm' vying for client business. Highlight staff members to provide a more personal touch and show your firm's human side.



Search engine optimization (SEO)

Your online content should incorporate SEO best practices to help businesses find you via search engine searches. This entails researching relevant keywords and incorporating them into the content, as well as making sure your content and website structure meet SEO best practices. As this can be an area that calls for marketing and technical expertise, it is often something to consider when you have specialized resources on board or hired to handle this.



Create a tactical marketing plan

We hear often that a tactical plan is the hardest for companies and business owners to build. If you’ve gone through the previous steps in detail, the tactical plan becomes easier. You’ve already determined who you’re speaking to, identified client needs, and what you want to communicate—now it’s time to create some goals and break them down into getting things done.

For example, let’s say that you set a goal of building a blog on your website to attract that niche audience. You’ll want to start by building a checklist of To-Dos based on where you are now and where you need to be to meet that goal.

Think of your tactics of before, during, and after:

- What needs to be done before this strategy launches?
- What about during?
- And how do we keep the conversation going after?

If your goal is to build a blog, for example, a high-level tactics list could be:

- Update and ready the website for a blog; make sure it’s mobile friendly.
- Create a content calendar targeted with answers to your ideal customer’s pain points and needs.
- Create the messaging for advertising your new posts on social channels.
- Build in the next steps for your potential customers once they’re reading the content (such as email capture forms and subscribe options).

From there, break the project down into the steps it’ll take, who’s responsible, and how long you think each step will take. We highly recommend building a calendar view to tell you if you’re on track or need to budget in more time to get things done. This type of strategy planning can be applied to any marketing initiative you take on.



Step 3: **Have the conversation**

How to identify clients who are ready for the switch

We often hear that accountants wait for that first customer to ask them for bill pay services, but many times those clients won't recognize the need or the solution themselves.

In addition to the marketing efforts you are doing to tell potential and current clients about your services, the conversations your staff is already having with clients are another excellent touch point to inform them about your services.

Your staff are your best resource to identify when your services can provide a valuable answer to a client's challenge. They are on the front lines, regularly examining your clients' finances and are perfectly positioned to notice signs that a client is ready for automation. Use the indicators we listed above for ideal clients to identify them in your existing client base.

How to have productive conversations with clients

Once you've identified client potential, it's time to reach out and have that conversation. The best way to start finding these potential candidates is to ask the right questions:

1. How much time per week do you spend paying the bills or reconciling receipts?
2. Do you have separate bill pay and bookkeeping processes?
3. Are you entering the same data in multiple places?
4. Are you using a manual, paper-intensive process to pay your vendors or track spend?
5. Do you have a clear separation of duties to help protect you and your employees from fraud?
6. Is your current process scalable as you continue to grow your business?

Each of these questions will help you gather information about how much a client needs AP or spend management automation.

If your client is a good candidate for BILL Spend & Expense, the conversation will need to go a little deeper, because the application and onboarding process for Spend & Expense requires a bit more client involvement.

Your client may have questions or concerns about switching to a new spend management solution. We have compiled the questions we see from clients most often and how to respond to them. Some examples include:

- We don't have enough expenses to make BILL Spend & Expense worth it.
- We already use our bank for everything.
- We have a lot of stuff going on right now and this isn't a top priority.



Step 4: Measure and adapt

Marketing is all about testing. Some messages or formats work better with different audiences or on different channels and the best way to find out what works best is to start trying out ideas.

Most third-party email sending and social media management platforms provide performance metrics for each email or post. These metrics can give you an idea of how people are responding to your marketing. If they aren't engaging, try changing some aspects. If it does work, try iterating on something similar to repeat the behavior.

Here are some examples of metrics you can track to measure your success:

1

Website and blog posts

- **Page views:** How many times a web page was seen.
- **Time on page:** How much time someone is spending on a web page.
- **Traffic source:** How people are finding a web page.
- **Top pages:** The most popular pages on your website.

2

Email marketing and newsletters

- **Open rate:** The percentage of email recipients who opened the email.
- **Click rate:** How often someone clicked a link within the email.

3

Reviews

- **Overall rating**
- **Number of reviews**

4

Social media

- **Impressions:** The number of times a post was viewed.
- **Reach:** How many individuals viewed a post.
- **Engagement rate:** The number of interactions a post receives per follower.
- **Likes/comments/saves:** How many times a post received this type of engagement.
- **Followers:** How many people are following your firm's profile.

Tracking these metrics over time and for each initiative will allow you to see trends and outliers and make data-based decisions as you continue iterating and trying new marketing strategies.

The most important rule of marketing is to have fun! There are ways to make your firm and your services seem exciting—and your clients are more likely to remember and engage with content that amuses them.

Marketing your accounting firm to clients can seem like a big task that requires a lot of expertise. But the reality is that with some patience and planning, anyone at your firm can get started. You don't have to go viral to be good at marketing—just start small with the projects your firm can focus on and add more as you grow.

Automate client AP, AR, spend, and expense. Join the BILL Accountant Partner Program.

LEARN MORE

bill

