Marketing & Selling

Tips and Tricks - some basic ways to implement marketing for your business

A core intention behind marketing is to create awareness. You may not instantly get clients signing up to services but making sure they know where to go if they do want a cashflow forecast, a board report, regular management reporting, business coaching, mentoring, accountability, etc is KEY.

1. Do your clients know what you offer?

Here are a few ideas to let them know:

- Newsletters: use the email subject lines wisely. Ie a subject like “January 202X Newsletter” may not inspire a busy business owner to open an email but “Better cashflow planning / Cashflow improvement” might be something that catches their attention
- 202X list of services - send an email to all clients at the beginning & mid-year to refresh them on all / any new advisory services. Subject line on this could simply be “202X list of services (and prices)”
- Remind them in every meeting
- Have it on the front page of your website, or on an easy to find dropdown
- Use compliance reports to engage, such as a GST return (include a free dashboard / snapshot of some basic financial KPIs like Revenue, Profit & Cash
- Post on LinkedIn and Facebook, keep things simple with:
    - Client references (ie “Firm ABC was super helpful when we needed to start presenting board reports, now our board members get a full breakdown...”
    - Services offered (ie “It’s cash flow planning season, reach out to chat about your cash flow plans in the new FY”)
- Maybe the best tip is to think about what grabs YOUR attention and then use that same strategy to get the message out to your clients

Consider using a company like https://www.accountanxy.com. They can help build your brand for $500 a month (a 6k marketing budget a year isn’t too bad)

2. Are your services relevant to your client's needs?

Are clients CONNECTING with what you are offering? A big part of this is the terminology that you are using. For example:

- If you know a client is planning to retire soon, offer them a Succession Action Plan (include the Action Plan page in this)
- If a client is struggling or wanting to grow their business you can offer them a Business Improvement Plan or a Business Growth Plan (once again the Action Plan page takes this from a standard management report to a plan of action)
- Offer all clients "Monthly KPI Monitoring" and build out a few basic Dashboard / Snapshot templates to do this. *We have standard templates ready to use as well
- Rename rolling forecasts to "Cash Improvement Plan" or "Cash Flow Plan" (include that Action Plan page again here to track talking points and actions to be done by the client before the next catch up)
- Some other renaming ideas:
    - CFO Decision Making Report (management report)
    - Rolling 12 Month Cash Flow Plan (forecast)
    - Health check (annual sign off) (dashboard / snapshot)

3. Basic Delivery Methods

Nobody has time for fluffy, marketing, spam-like content, so keep it real, authentic and to the point. The tried and tested methods of our time are simple:

- Easy Emails (keep it short with one call to action or a short paragraph - the less 'clicks' the better)
- Direct calls
- Use social media. You don't need to be super proficient, keep it basic with simple posts. Even if nobody comments or likes it, that's ok - they'll still see it (think about how many posts you see on social media that you don't respond to).

4. Timing:

- Aim to send out 'general / newsletter' emails once a month / every 2 months
- Aim for direct calls every 3 months
- Aim to post something on social media once a week

In summary - we're all people dealing with people. Everyone is busy, everyone is faced with content fighting for their attention. So keeping it clean, simple, authentic and honest is the way to go. That mindset + the regularity of reachouts will get your message across.