

“This book provides very generous insights from the industry’s leading marketing expert that will challenge, illuminate and ultimately deliver results!”

—JAMES ASHFORD, #1 BESTSELLING AUTHOR

THE ACCOUNTANT *Marketer*

THE STRUCTURED APPROACH
ANY ACCOUNTANT CAN FOLLOW TO
ATTRACT CLIENTS THEY LOVE

KAREN L REYBURN, CPA

FOREWORD BY **PAUL BARNES**, Owner and Managing Director, MAP



Intro & chapter 1

The Accountant Marketer: pre order

by Karen L Reyburn, CPA

Chapter 0: Things You Need to Know First

Introduction

“I am an accountant, not a marketer,” you say.

What if you are not only a marketer but actually you have what you need to be quite a good one? What if all you need is a little direction and training?

As an accountant, you're good at what you do. You've trained and even qualified in it, you feel comfortable with it, and you have the experience and stories to prove it. Marketing, on the other hand, feels less familiar. You know your firm needs it, but you figure if you stay focused on serving your clients well, the leads will come. A few tactics, some things you saw worked for other accountants, and (you believe) you'll be good to go.

You're used to going straight to the numbers. The data. The quick wins, the instant return on investment (ROI). You want to spend a little, get more in return, and be confident you are not wasting a single moment doing what won't work.

However, when you approach marketing from that angle only, eventually you will struggle. Your tendency will be to focus on those same numbers and depend on them to fix the problem. “*I just need more leads*”, you think. “*Got to fill that funnel.*” But what if simply getting more – more numbers, more leads, more clients - isn't the best solution? What if you get those numbers, get the clients, and then discover new problems with the type of clients you're getting?

I've been helping accountants with their marketing for over twenty years, and the things holding you back in marketing aren't the things you think they are. The single biggest roadblock to creating and delivering great marketing isn't knowing the tips and tricks, the tactics, or the actions to take to deliver a great ROI. It's the mindset you hold about yourself, your responsibilities, and your ideal clients which will change everything.

When you take a step back and look at the structure of marketing—where leads come from, who marketing is for, and what to create in what order—marketing begins to look a lot different. Instead of putting the burden on more numbers, more successes, more quick wins, you take the responsibility to heart and look at what it is you really want from your marketing. And it goes far beyond “more clients” or “more profit.”

Marketing is not one solo part of your business, something you put in a nice, tidy category or delegate to someone else. You can delegate marketing tasks, hire a marketing agency, build a marketing team, and even outsource your marketing department. But for marketing to work the way you’ve always wanted it to, you, the accountant, must understand how and why it works and where all the elements of marketing intersect. Your marketing is a reflection of you and your accounting business, and therefore it is entirely your responsibility.

Being a good accountant allows you to run an excellent accounting firm and truly help people in their businesses. But if the story your marketing is telling doesn’t fully reflect the amazing accountant you are or the firm you’re part of, it’s your responsibility to fix it. Those gaps in your marketing will get wider and wider over time until your marketing is actively turning away the very clients you wish you were getting more of. It might succeed in bringing in a few ideal clients every once in a while, but it will bring many who aren’t a good fit. Clients who aren’t the right type of person or business for your firm to work with, and who don’t have the same values as you do.

This book is your progressive plan to make marketing work *for* you as an accountant. You may even be surprised to discover...

...you don’t hate it and aren’t bad at it.

...maybe you actually quite like it.

...maybe you're even pretty good at it.

...maybe you enjoy it.

...maybe you can come to love it!

When you understand and love marketing, you accept your role as an Accountant Marketer, and marketing ceases to be an obligation weighing on your shoulders. It becomes your helper, something you never imagined marketing could be: an integrated part of your business contributing to a drip feed of the kind of prospects you love to hear from and who then become the clients you love to work with every day.

Start small, start safe

The first time I went snowboarding, I spent almost the entire day on the learner slopes. The “bunny slopes”, they called them, to make sure I, a newbie, understood my low and weak position compared to the adventurers, the wildcats, the mavericks of the black runs. As much as I loved the idea of me swooping down the slopes like an Olympian, wild and daring and fearless, I recognised I wasn't even able to get both feet locked into the snowboard without falling over, so, the bunny slopes it was for me.

The ski resort suggested taking a lesson first thing, before we learned any bad habits. For forty-five minutes, we'd get direction and guidance with all our falling over, and then we'd be released to fall over all by ourselves.

I saw the value of this. I'd tried skiing before, and although I was hardly flying down the black runs, skiing made sense to me. I fell once or twice, but I did some flying and turning and felt very Olympian—at least in my own mind.

Snowboarding was not like that. At all. Snowboarding is like surfing or skateboarding, neither of which I have mastered in any way, shape, or form. The difference with snowboarding is your feet are locked onto the board itself so when you fall it comes with you. And when you fall, you land in soft snow, so it's not as harsh as concrete or as spluttery as seawater.

Falling was the lesson of not only the forty-five-minute training session but also the next eight hours. My instructor told me, "You'll basically fall a lot, so it's important to fall right." I thought he was exaggerating, but after an hour or so, I realised he was correct. (Though maybe "constantly" was more accurate than "a lot.") I got up and fell. I shifted my weight and fell. I leaned back and fell. I leaned forward and fell. The instructor showed me how to lean, how to fall, and what to do after I fell in order to get up quickly and try again. I spent the entire day falling...and yet I found myself really enjoying it. I loved the challenge, and I kept trying.

By the end of the day, something finally clicked, and I was actually snowboarding. I was moving—fast. I was lifting the board, and my whole body came with it. I was turning, landing, and moving again. I loved it. I was bruised all over (and knew there were more bruises coming), and I couldn't wait to do it all over again the next time.

As an accountant, marketing is going to be for you like skiing or snowboarding were for me. It will either be something you think you understand pretty well, and you pick up fairly quickly without much training or practice. You point your marketing in the direction you want to go, and it more or less takes you there, so what you want is to get better at it. Or maybe you're like me and snowboarding, and marketing is something you don't understand at all. Things don't work too well, you try things and don't see a return, and you fall a lot.

This book is for both kinds of accountants. Those of you who have picked it up fairly quickly can unlearn bad habits picked up from doing marketing on your own, and if you're just

getting started, this is your chance to get it right before you even get going, before you learn those bad habits.

To all of you, I say, start small, start safe. Your goal is not to be an Olympian marketer, much less becoming one by the time you're done reading this book for the first time. It's about doing marketing in a way that makes sense both to you and the clients who are drawn to your firm. It's about falling—a lot—but doing so because you are actually trying and directly involved. It's about falling in a way which hurts you less and teaches you more. And it's about actually enjoying marketing and discovering to your surprise you are pretty good at it too.

This isn't a marketing instruction manual, with a list of actions guaranteed to deliver results. Every accountant is a different human with different skills, talents, and tendencies. Your firm is different from others because of who you are as a human, because of all the humans who work for and with you, and because of the humans who pay for your accounting services. You're learning to snowboard, and how you do that will vary from how others learn. You get some direction, strap your feet in, wobble a bit, fall, and ultimately move in the direction you want to go, tackling the run you want to be on at the speed you feel comfortable with.

Marketing isn't a dry, emotionless list of actions which works for everyone; it's a process of telling stories. Your firm has a story. Your clients have stories to tell. Think of marketing as your storybook, and this book as your guidelines to follow so the story gets told well, to the people who need to hear it.

“Start small, start safe” means you get to choose how quickly you move, how much you spend, and what you try. It means growth or success will look different for you than it will for others, and you don't have to do what others are doing (and indeed I'd recommend you don't focus on that). This opens up potential for you, including:

Not having to choose an exclusive niche straight away (or at all). You do need to identify the audience you want to work with, and this will get more specific over time. But you don't have to choose only one industry. You might not choose an industry as your audience at all. We'll talk more about your audience in the next chapter.

Doing a little bit of test marketing instead of going all-in straight away. You don't have to (and I would argue, please don't) create an entire brand with a new firm name and new website with its own domain straight away. If you're trying to reach a new audience or promote a new service or course, create one website page on your current site. Write a few blog posts and record a few videos. Follow your ideal audience on social media, make some connections, and see how it goes in a small way first.

Creating the kind of content which feels more comfortable to you at first. You may be more comfortable writing blog posts than recording videos, and that's okay—at first. Yes, you want some wins with marketing to keep yourself motivated; you also need wins to build confidence. You need to know you can do this. As we'll talk about in chapter 10, video will completely change the way you engage with your prospects, and it will help them make decisions faster as well as save you and your team time. But if video feels scary (or downright terrifying), start with what you can do. The blog posts you write could become scripts for videos in the future. You could record short screensharing videos for a client you love working with or for your team.

Trying something with no idea whether it will work or not. Falling doesn't mean you've failed and have to start thumping your way back to the ski lodge. It means you get back up and start again. Download a new social media platform and start using it. Write a few personal emails to specific clients. Start writing blog posts every week. Download and edit

images on your phone to fit your firm's brand. Learn how captions work for videos. This turns your attention from asking "will this one action deliver leads?" and it helps you take another small step to build your marketing toolkit.

Giving yourself permission to go at your own pace is the first step. Next, you need to hear that creativity is for accountants too. You're not held back because you're an accountant: your skills mean you are uniquely placed for great creativity in marketing.

Accountants, you are creative

As a part of starting small and safe, it's time to recognise you, the accountant, are creative.

You personally are creative. Your team is creative. Your firm is creative. Creativity is a quality all humans innately have, regardless of our role or job or how we perceive our fit into society. Every human is designed to be creative, and we have these qualities long before we learn who we are as individuals. And yet the belief that "accountants aren't creative" is one you've heard, been told, or, worst of all, told yourself for most of your life. Ever since you decided to be an accountant or chose to work in accounting, there's a part of you that believes you are boring, the complete opposite of creative. What you do on a daily basis can reinforce this belief:

Following rules.

Ticking boxes.

Putting numbers in columns.

Telling people what they can't do, what's not allowed.

That's certainly how others perceive accountants. Even doing an image search for "accountants" brings up endless pictures of people in suits sitting at desks with calculators. But that isn't who you are, and it doesn't reflect how you help people.

For many of us, creativity brings up the idea of artists. Painters, writers, illustrators. We think the only people who are creative are those who....create things. Out of nothing. Ex nihilo. As an accountant, you don't do that. What you work with is presented to you. Sometimes it's a mess, and you make sense of it, but you're not usually starting with a blank page or canvas.

The more time I spend with accountants the more I see your creativity. I see you coming up with ideas, hesitantly sometimes, but still asking the creative question "what if we...?" You explore how you can help your clients better and how to live out your culture and values better. You praise your clients for what they do well in marketing, social, and video, and wonder, "Maybe we could do something like that". Yes, a creative team can take your idea and help bring it to life or turn it into something on-brand and visually impressive, but the core idea is yours. We are all being creative in our unique ways.

Defining creativity is hard. What *is* creativity, after all? How do we define it? How can you accept you are creative and notice it in your business and life?

Ed Catmull, computer scientist, cofounder of Pixar, and president of Walt Disney Animation Studios, said in his book *Creativity, Inc.*, that he intentionally tried not to define the word 'creativity', because that didn't seem useful. "I believe that we all have the potential to solve problems and express ourselves creatively," he said. "What stands in our way are these hidden barriers - the misconceptions and assumptions that impede us without knowing it."

Ultimately, creativity comes down to two things:

problem solving

and

curiosity.

At one of PF's "Accountants are Creative" events, I asked an accountant to speak about how he views creativity. He shared how it's about problem solving and inviting other perspectives. He showed how he and his firm have used creativity and an entrepreneurial mindset to work through the problems they faced; this included systemising communication so deadlines were always met or setting up the qualifying process so they only took on the very best clients (rather than just any client who might become troublesome later).

Every accountant present was spellbound. They had so many questions. They all wanted to talk systems and processes and how-tos, and for a moment, I thought, *No, this isn't what I meant for us to talk about. We're supposed to be talking about being creative!* Then I realised I was the one with the wrong perspective. Yes, creativity includes your marketing, your brand, and your events. It includes getting materials and websites designed and having printed banners and art. But it also includes solving problems and being curious. Those two qualities lead to all kinds of creativity, whether it's a designed image for your marketing, a new onboarding system, or a better way to communicate with your clients.

Accountants, you are creative. And if you choose to believe you're not creative, it slows down or even shuts down the very qualities you need the most, the ones which help you, your firm, and your whole team. When you think about problem solving and curiosity, it's a little easier to believe in your own creativity. You can say to yourself, "Okay, maybe I'm not much for drawing, painting, sketching, or even writing. I find it easier to send an email or work through a spreadsheet than try something new, like writing a blog post or recording a video. But what's the problem here I can work on solving? How can I have a curious, open mind to ask questions and see things differently? Who could I involve in this process to help me see new possibilities and remind me when it comes to creativity, there's no right answer?"

That's the real kicker with creativity, especially for accountants—there's no right answer. There are no debit and credit columns, always adding up. Creativity can be a bit of a mess, like a child with crayons going all over the page and outside the lines and maybe even onto the table (or wall). You try something. Maybe it works, and maybe it doesn't. Maybe it sort of works, but you need to tweak it a little. Maybe in the process of working on it, you realise what's not working. Maybe you struggle to figure it out, so you scrap the whole thing and try something else.

Yes, accounting follows rules, and you help your clients stay on the right side of those rules. But what you really love—what stirs you up, gets you motivated, and keeps you doing this work called accounting—is the conversations with your clients about their business problems. Whether it's a problem with their software, prices, products, taxes, or profits, you get to look at the pieces and help them consider what the possible solutions are. You and your client both get to stay curious, ask new questions, get excited and find a new way (or an old way) that works. All of this is creativity. All of this is problem solving, curiosity, and trying. You are creative. And your team is creative too.

Personal involvement makes your firm's marketing better

When you have team members, even if it's only one other person right now, get them involved with marketing too. The more involved they are, the more accurate your marketing is, the better reach you get, and the easier it is for people to see who your firm truly is. Marketing isn't words on a website page; it's telling people how things will be once they start working with you. What you say and share is meant to be lived out by people—you and the people who work with you.

One of the challenges with involving your team is understanding the level at which they want to be involved and how much you want them involved. After all, they've been hired as an accountant, bookkeeper, payroll specialist, or some other specific role. When we talk with accountants who have never had this conversation with their team, they often find their efforts to introduce marketing involvement meets with resistance. The team members don't want to do social media; they want to do accounting work. They don't want to record videos; they feel more comfortable sending emails. They don't want to write blog posts; they want to do the work they were hired to do.

In one sense, that's correct. You haven't hired them to be marketers, and one of the worst things you can do is place the burden of marketing responsibility on people who haven't been trained for it, don't understand it, and would be doing it on top of the job you originally hired them to do. However, just as you are reading this to discover how and why you need to be an Accountant Marketer, your team need also needs to learn they will have some involvement in marketing too. Marketing isn't something set aside only for a marketing team to do in isolation. It must be connected to everything and everybody in the firm so it is more accurate and more authentic. Your marketing flows from the work you're actually doing with clients, and who is doing that work? The team. All of you need to understand the Concentric Circles of Team Involvement in Marketing.

[image of concentric circles]

The Concentric Circles of team involvement recognises not every person in the team has the same responsibility or involvement in marketing, and that's okay. It also shows every person in the team does have *some* involvement and responsibility in marketing. Let's go through each of the levels:

Leader: That's you. Marketing is ultimately your responsibility, and you must own that. Reading this book may be one of your first steps towards understanding this. The buck stops with you. You don't abdicate responsibility for marketing; you delegate it. That means you're involved at the very heart of marketing. You care about it. You listen, suggest ideas, write blog posts, and record videos. You talk with your marketing manager and team. You review the numbers and discuss analytics for your firm. The responsibility for ROI is yours too. It's yours because the business is yours. We'll talk more about that in the final chapter of this book.

Creators: These are the people who are excited and willing to create content, which includes writing blog posts, recording videos, and sharing on social. This could be one person or two people to start, but eventually you do want more people moving from other circles into this one. However, this takes time. There's no race to push someone from thinking "I'm an accountant" to "I'm uniquely and daily involved in marketing" within moments. The kind of firm and brand you have will direct the level and speed to which this happens. If you have a fast-growing firm, changing often and quickly, you can introduce this concept right away and involve the team without delay. If your firm moves at a slower pace and change takes time, you can introduce this concept in stages and consider comfort levels of those you involve in marketing. It's your call. But at the beginning, you need at least one other person to join you in learning and applying marketing to your firm. This is particularly hard in larger firms where marketing is delegated to others and most of the team do "the accounting work." Maybe there's one director who has been tasked with marketing. Eventually, you need everybody collaborating in marketing; but if you have at least one other person alongside you from the start, you can make a lot of progress and start to see results. These results encourage others to move circles.

Contributors: These people are not actually creating the content yet, but they are actively contributing ideas, questions, and observations. When the firm posts a blog, they read and comment on it. When the new website is launched, they have ideas and observations to share. These are generally people who want to be Creators, but don't have the confidence yet or they aren't sure what kind of creating they want to do. Let them contribute, and listen to what they have to say. Encourage contribution by asking specific questions and holding meetings designed specifically for these team members. Give them training. Invite them to marketing meetings. Let them absorb, learn, and contribute.

Collaborators: This is everybody. Every single person who is part of the firm from the admin assistants to the payroll specialists, from the bookkeepers to the receptionist, and from the IT department to the partners and directors. Every single person in the firm needs to have some sense of what marketing you're doing, who your audience is, what the firm's brand is and why, and how they are a part of the whole marketing picture. Ideally, many people will be moving from Collaborators to a more active Contributor role, but it's okay if that takes time. Some people will never move out of this circle, and that's okay too, as long as it's the right place for them. You never want someone's motivation for leaving or staying in a circle to be fear, or an unwillingness to change or try. Give them every opportunity, every training, every direction, and it will become clear which circle offers the best position for them to participate in the firm's marketing.

When I first created the Concentric Circles asset, I shared it as a sketch with owners and leaders of accounting firms and asked them to identify where they were on the graphic. One firm owner said, "I'm in that white area outside of the circles." I realised I'd been expecting leaders to see themselves within the diagram. I hadn't anticipated how much the feeling of barely getting

started, not being organised or ready, or merely thinking about where to begin would impact where they saw themselves. I admired the honesty in that reply, and we agreed his first goal was to move into the Collaborator circle. We talked about the progression from one circle to the next, how long that might take, what he could do to make transitions more quickly, and where the rest of the team were.

The team will follow your leadership. If you, as the leader, hang about at the outer edges or in the white spaces, they will too. If you begin to move to the outermost circle, they will come a little closer. As you move deeper within, they will too. Your job as an Accountant Marketer is not only to be personally involved in marketing but also to encourage involvement from the rest of the team.

Most importantly, none of this will work unless your firm is a place of psychological safety. This means it is a safe place where people can live, work, and mess up sometimes. This a place where...

...people can make mistakes and not be terrified about what will happen to them.

...people get praised when they do great work and held accountable when they do something not so great.

...everyone is human and admitting that isn't seen as weakness.

...people are allowed to be curious and get things wrong without being punished.

Otherwise, they'll try once and give up out of despair, and you'll be worse off than you ever were because they're not going to try anything, out of fear of reprisals.

A place of psychological safety is really tough to build. At PF, we've been consciously working on it for years. The most important factor of all is the leader is never the one who gets to say whether the workplace *is* safe or not. Only your team members and clients get to decide that.

You can say you want your firm to be a safe place for people to work and live. You can say you're working towards it being a safe place and be open to listen when someone mentions (or hints) it's not. You can (and need to) work on your own transparency and vulnerability because that encourages others to do the same. You can take responsibility when you fail. You can share failures and learnings together, focusing on what the learnings tell you. Building your firm into a place of psychological safety is hard. It's personal. It's full of vulnerabilities, fears, and failings. But when the team feels safe, you know the company is safe with them. This includes your brand, social media, and marketing. When everyone who works in your company feels safe, they do their very best work and reflect the company well on social and elsewhere.

Accepting your responsibility in marketing and what you're learning as an Accountant Marketer is a good start towards building this place of safety. When you understand marketing is far more than a list of actions for one person or a small team to carry out, you may realise you have a lot of work to do when it comes to the culture of your firm. This is work related to your brand and values, how you hire, and the way you lead. It's how you help the team feel part of the firm you're building together. Recognising how marketing is connected to every single spoke of the accounting firm wheel is a first step. The spoke we'll talk about next is hiring new team members.

Marketing isn't only for attracting clients

Marketing isn't only about reaching potential new clients. When you use content marketing to share who your firm truly is, it helps future team members see it is a place they want to work. This is why all your marketing must be an accurate reflection of who you truly are. Often our Accelerator members ask, "Would it be okay for me to write about....?" Often what

they're asking about is a topic which seems to have nothing to do with accounting. It could be the new house they're building, social justice, women's rights, or environmental impact. I'll give you the answer I give them: if it's important to you, it will help your marketing attract the people you want, both clients and team members. If the environment or social justice are important to you, not only is it okay to write about those things, I'd argue you really must write about them. What you believe in affects the way you approach the world around you, how you deliver accounting services, and how you choose who to work with. You work with people who matter to you, whose businesses matter to you, and they need to know what this looks like for you.

Some businesses will literally work with anyone. I've known firm owners who will sign up a client they don't really like or believe in, but the business is big, the fee is high, and the work falls within their expertise. That's a short-sighted way to do business. Inevitably, something will happen to make the relationship difficult. It's difficult for you to serve a business owner, helping them grow their sales and profits, if you don't believe what they're doing is good or worthwhile. It's hard to advise someone about their numbers, and ultimately their life, when their values aren't yours. They need to match.

The same applies to reaching potential new team members. Part of the impact of your marketing will be helping future team members understand who your firm is, how you do business, and what you care about. The more they understand your firm, the more likely they are to know whether this is the place for them before they start working there. The more they understand before they're hired, the more "on brand" they will be once they join because they won't have to learn a hidden culture, one which wasn't fully expressed online.

As we'll talk about in the first chapter, when you prepare marketing content, you start with your audience: who they are, how they feel, and what they're going through right now.

Potential employees are an audience too. As you prepare career pages, role descriptions, and videos, think about how the person looking for a job is feeling. Most potential employees will be nervous you aren't who you say you are on the "About" page of your website. Before they apply, they'll read your values, which likely sound admirable. They'll read the bios of your partners and team members, which seem interesting and share some personal quips or quotes. They'll explore your recent blogs, watch videos you and the team have created, and they'll read through your social media posts. But even when all of those match and show patterns of your approach to accounting, business, and life, they may still feel unsure. What if it all seems great, and they leave their current job and come to you but within a few months realise it was all a show? What if it's all merely words, a facade of nice-sounding values covering over the same difficult work environment they left behind? You can assuage those fears by showing the true heart of your firm in what you say, the things you post, the videos you record, and the way you interact with people on social media. Potential team members will notice. And if who you seem to be in your marketing is appealing but does not truly match the way the rest of the firm really behaves and does business, you've got some internal culture work to do.

ROI comes from following the twelve elements in order

Return on investment (ROI) may feel like the most important part of marketing. The twelve elements in the following chapters will help you discover how you get that return. I'll talk about the specific topic of ROI in the very last chapter, not because it isn't important but because you'll be tempted to make it your highest priority. Before you start looking at audience, you'll be thinking, "But how will I get them to sign up?" Before you start thinking about the issues and feelings and problems they face, you'll be wondering, "But how many leads will I get?" When

you focus on ROI alone, you miss out on the purpose and intention of marketing, which is to speak to your audience and help them. This in turn will help you.

The beauty of these twelve elements is how they help relieve the burdens you've been carrying. Marketing isn't meant to be a burden; it's meant to relieve your burdens. It helps the right kind of people to find you, and delivers the very best clients to you on a drip feed. The great news is you don't have to put pressure on yourself, your marketing team, or even your prospects. Good marketing can handle the pressure when you let it do its job consistently and patiently in the same direction, tracking the numbers all the way.

When you are an Accountant Marketer, ROI is not someone else's responsibility; it's yours. You don't hand it off to someone else, shouting, "Show me the money!" or "Prove this works!" ROI doesn't belong to your marketing team, your business coach, the ads you run, or even this book you're reading. The responsibility for ROI belongs to you because the business is yours. The time you invest is yours. The team is yours. The money is yours. The ownership is yours. Yes, you need to see a return, and you will get that return when you follow the marketing map; apply the twelve elements of content marketing; and invest money, time, effort, partnership, and opinion. You will see your numbers improve, whether it's website numbers, social numbers, sales, or profits. But the credit for that doesn't sit with a marketing agency or with a coach. We aren't the ones who get the results for you. You're the one who makes it happen.

You're the one who identified your goals and shared your perspective, collaborating with others to connect those elements to marketing actions. You're the one who thought about your firm's values and shared what matters most to you in life. You're the one who hires the team, trains them, and helps them work with your clients. You and your team decide whether to take

on a client or not. You decide to sack a client if they're not living your values and aren't a fit anymore.

A good marketing agency will take seriously your need to see ROI and help you understand what that looks like for your firm. They will also take responsibility to advise, direct, educate, and support. They'll share case studies. They'll rejoice and groan with you in appropriate measure. They'll celebrate the wins and work through the losses, looking for patterns and helping you see what can be hard to see because you're so deep in it. But the wins (and you will get them, and they will be big, and you'll be so excited) are all yours. A good marketing agency will be pleased with you: but *you* are the one who's done it. You're the one who "got the ROI." You're the hero, not us. We're just the guide.

The same principle applies to the relationship I have with our own accountants. I meet with my client manager monthly to go through the accounts. We identify what numbers went up and which ones went down, and we discuss why. We celebrate when the profit percentage is rising, and we consider what to do if it's not. We meet annually to set budgets, targets, and goals. But when we have amazing results, he says, "Really good job. Well done to you and the team. *You* did this." I thank him and the whole firm for how they contributed and for being a calm voice of reason when we have fears. I thank them for helping us see what other agencies like ours were doing (or not doing) and how we can learn from that. We're grateful to have them there, supporting, advising, and guiding. But ultimately, we are the ones who got the profits within our business. We're the ones who got the ROI.

That's what I want for you in your marketing.

So before we look at the numbers, start tracking them, and getting new leads, let's turn our attention to the reason you're doing all this marketing: the people you most want to work with.

Chapter 1: Audience

When I started working in an accounting firm, I was asked to help with business development and marketing. Early on, we were talking about who the ideal client is for their firm, and how we would decide which ones to choose. The partners laughed and said, “Really, it’s anyone who will write us a cheque!” Time has moved on, and now it’s bank payments and payment authorisation apps, but the principle is still there, and the joke isn’t really a joke after all. It wasn’t a joke in the firm I worked in, either; we really would take anyone who would pay us. The problems resulting from that were significant. We worked with clients who didn’t pay their fees. Clients who brought their records in a day before the deadline, clients whose business we didn’t fully understand, and clients who didn’t understand what we were doing for them.

The “anyone who will pay” approach is old-school thinking, and it builds bad habits. The truth is, you do *not* want anyone who will pay your fees. Just because someone pays your fees doesn’t mean they’re the right client for you and your firm to work with. Are they your kind of person? Do they live out your values? Do you *like* working with them? Will you be able to get results for them, and will taking them on help you be a more profitable firm?

There’s a big difference between good money and bad money. Good money is money paid to you from a client who is good *for you and good for your firm*.

Bad money is money from anyone else.

The amount doesn’t matter. You know as well as I do what it’s like to take on a client because they seem so attractive at first. They have three businesses! Their sales are growing every month! They’re so keen and enthusiastic, and everything is a yes. And then over a period of weeks and months, you start to see this enthusiasm and energy means you’re working with someone who continually changes their mind. Who will change accountants again, on the spur of

the moment, like they did when they came to you. Whose moods change like the weather, and you find one of the team crying because of something the client said or how much pressure they were under. You can learn about setting expectations, creating good systems, being clear with boundaries, and helping the team do the same, but sometimes no matter what you do, no matter how much money a client is willing to pay you, it's still bad money.

Similarly, you could take on a client who is young and keen, listens to everything you say, works hard, and pays a very small monthly fee to start. The work is still profitable for you, but it's small in comparison to some of your larger fees, and it's certainly not the size of the fee you got all excited about with the client who had three businesses. But this other client paying you smaller fees is your kind of person. They listen to you, they value your advice, and the moment their business grows or they start diversifying or growing globally, they buy more and work more closely with you and continue listening. This is good money—they're a client who is a good fit for you.

Think about who a good client is for your firm. There's no such thing as "a good client" in the abstract. There is no objective ideal in marketing because it's your marketing. All that matters is what fits for you.

And yet, oddly enough, the place we start is not with you. We start with them: the clients you want to work with. These are the people you want to discover your firm. This is your audience.

Good marketing makes your buyer say, "Oh, that's me!"

We start here because your marketing is not for you.

Your brand is not for you. Your website is not for you. The blogs, videos, content, and social posts you share are not for you. Your website, your emails, your social media posts, your team, your systems—none of them are for you. They all exist, as does your accounting firm, for the people and businesses you serve.

Yes, marketing needs to bring you a return. So does your entire accounting business. We'll talk more about how to track marketing return in a later chapter, but if you focus your thinking on you and what you get (even subconsciously), your marketing will reflect that, and your audience won't find it as appealing. When your intention in creating a website page is focused on "making more sales" rather than helping your audience to solve a problem, they won't feel heard or see the solution for what it is. When you choose a name or logo based on whether it is appealing to *you*, it won't be as appealing to the kind of people you want to work with. Because your logo is not for you. You are not the audience.

As Donald Miller says, your client is the hero. You're the guide. You're still someone important – you're Dumbledore, you're Gandalf, you're Yoda. But every moment you spend thinking about how your marketing is going to help *you* is a moment lost thinking about your clients. What do *they* want? What do *they* need? Why *they* would read this email or sign up with you as their accountant?

Make everything about them, so much so that when they see your content, they think, "Oh! That's me!" You want to be so specific they're almost shocked. They say (or think) things like:

- "I didn't know it was possible to find an accountant who gets how I feel."
- "Wait—is this an accounting firm? They're so helpful and understanding. I didn't expect that."

It may be surprising to you how much emotion is involved in choosing an accountant; they need to *feel* (as well as believe) you can help them.

Accountants have historically been all things to all people. You do your accounting work and maybe some advisory and strategy for anyone who needs it. Maybe after a while you stopped working with smaller or start-up businesses or stopped doing tax returns only, but you'll still take anyone who wants to work with you or is ready to pay you money. And you're almost afraid of doing marketing which will send people away. However, the very best marketing *does* send people away. That's its job.

Good marketing divides.

It draws in the very best clients for you, and it is literally unappealing to the sort of clients you don't want. It sends them away. This doesn't mean they aren't lovely people with amazing businesses. But there will be people who think they want to work with you who are not *your* kind of clients, because they aren't the ones you know best or are best placed to help.

At PF, we've worked exclusively with accountants for over ten years. We also work with a particular kind of accountant we've defined as ambitious accountants, who serve with heart, who have ideas, and are willing to be involved in their own marketing. When they come to us, they're still getting the kind of clients they don't want or their prospects and clients are leading the marketing. This means they're waiting on the prospects, not taking the initiative. Your marketing doesn't have to work this way. You have two options:

- You can try to appeal to lots of people and market from a place of fear; or
- You can appeal to *only* those you absolutely want and no one else, and market from a place of confidence.

Your audience wants you to choose the second option. They want you to be confident. They want you to know who you serve, and to feel they're critically important to you, that they're not simply another client. Once they sign up with you as their accountant, you are in a position of massive trust. That trust starts building long before they send an enquiry.

As an accountant, you're not selling stuff, a product they can buy from you or anywhere else. The work you do is deep. You're talking about families, money, and personal worries and fears. Some accountants tell me, "I think part of the accounting qualification needs to include training in psychology, therapy, and relationship counselling!" You know when your clients are getting divorced or thinking about it. You know the milestones of their lives and the names of their children and pets. Your client pops round, or you do, or you get together for drinks or dinner.

It's relational, not transactional.

You do want to sell services and make a profit, but that's because profits are what provide for you, your family, and your employees. They help deliver the life you've imagined, and they do that for your team as well. It's lovely when your clients' businesses become more profitable and they need more services from you, but ultimately you care about your clients and their successes. You're building relationship. It's relationship which will bring you both the returns you're looking for. When you think about your ROI, think beyond the monies, the services, and the leads. Think about the relationships you're building, and be someone who delivers a return on that relationship. Then it will deliver a return back to you.

You may want to know what marketing *stuff* you need to do. What actions work best? Which tools and apps do you use? What content do you write? What analytics do you track and when, and what do you keep doing or stop doing? As with all marketing questions, the answer is

“it depends,” and it depends on the kind of audience you’re talking to and their preferences.

Behind all this *stuff* are the people you want to work with, and the messages they will understand and appreciate. They want to see you understand them and the problems they’re facing on a day-to-day basis. This is a relationship you’re building. And good relationships take time. Let’s look at how that works from a buyer’s perspective.

How your buyers buy: the Progression Model

Overheard in the pub: “Hey, you seem like a nice person. Want to get married?”

Actually, I haven’t overheard that in the pub, but if I did, I would immediately know it was a bit odd and possibly creepy. What kind of person wants to leap from “I’ve never met you before” to “Let’s build a lasting relationship”?

Unfortunately, for many accountants, this is what you’re trying to do with your marketing. You want to move potential buyers from a place of never having heard of you before to a situation in which they are trusting you with their financial and personal information and a significant amount of money as well. Regardless of the type of relationship it is, building that relationship follows similar principles. Whether you’re getting to know someone at the pub who seems like a pretty cool person or you’re connecting with someone who could eventually become a client of your accountancy firm, you can’t rush things. There’s a process.

You want the drip feed of good clients. The magical place where people find you and come to you, slowly and steadily, and neither you nor they actually remember where the relationship began. Maybe you even build a waiting list because the drip feed is working so well. Content marketing delivers the drip feed and does it at a slow burn. You may have invested some time and money in this already. You’ve been blogging, sharing a few videos, being more visible

on social media, and perhaps you've run an event or tried some social ads. But in spite of all your efforts, you're not getting that drip feed of enquiries you were hoping for.

Why? You're missing a few elements from your progression model.

Accountants are in a massive position of trust, and marketing is your opportunity to build trust with people who don't know you yet. The Buyer Progression Model helps you see the progress your buyer makes and helps you identify the type of marketing you need at each stage.

[image: buyer progression model]

Each stage of this model varies depending on the type of person and audience. It may take days; it may take months or years. Depending how they think and make decisions and how clear your marketing is, their progression time will vary. You can even begin tracking the numbers for each section of the progression model so you know what your buyer's progression is and plan your marketing accordingly. Here's how each section works.

Nothing

At this point, your prospect has never heard of you. They literally have no connection with you, they don't know you exist, or they may not even know accountants like you exist. They have concerns, fears, and issues, and those may be pushing them to take action or maybe the prospect is actively ignoring them. Your goal is to move them to awareness.

Awareness

Here, you want to appear on their radar from time to time. The more often you appear, the more likely they will move to the next step. The buyer reads website pages, follows you on

social, reads and absorbs blog post content, and watches videos. This content you've created is answering the questions they have, teaching them about what confuses or bothers them, being helpful—and they notice it. Building awareness can be a short or a long process; it will vary depending on how much time and money you are ready to invest. If you throw yourself into this fully by trying things, being willing to fall or fail, involving your entire team, getting help, learning, and making it a part of your daily work, then you will build awareness more quickly. If you go a bit slower, the process will take longer. Either way, it will still happen, and small daily actions build on each other until one day you realise you have more people on your database, following you on social, or recognising your firm name.

Here are some of the ways you can build awareness of your firm and your expertise. If the suggested time frames feel too much to start with, start small and start safe. Do these activities once a month if you aren't ready to do once a week. But start, and keep going. Each each of these are discussed in more detail in subsequent chapters.

Regular blog posts: I'd recommend writing one per week. Write them yourself, involve the team, or outsource the work (as long as the content is yours and unique to you). Building fresh content helps you get found.

Social media daily posting: Have a consistent presence on at least one of the basic social media platforms (i.e., Facebook, Twitter, LinkedIn, Instagram), and post on a daily basis. Ideally, you will be doing the posting personally, and your team will be involved as well: but you can also outsource some of this, so if you're busy or are away, you're still building social awareness for your firm.

Videos: This is the most powerful way to build trust and awareness at the same time. Prospects see you, they hear you, and they learn from you. They get familiar and comfortable

with who you, your team, and your firm are. Start recording videos to answer the questions you get regularly from clients or prospects.

Connections: This means engaging with people as the real humans they are. You're not offering them a download or inviting them to an event; you're simply commenting on their post, asking a question, or sharing their content. Ideally, you and your team will do this on a daily basis. Even five minutes a day will help you be more present and build awareness.

At this stage, you are being the least sales-y you could possibly be. Most accountants I talk to have a horror of being "salesy" and don't want to pressure people or push them into something they don't want or need. Most people fear being "salesy" because we hate being on the receiving end of this type of approach. The Buyer Progression Model is about slowly sharing yourself and your content so the right people come when they are ready. Answer questions they can review when it feels right to them. They can go at their own pace. You can influence their progression, and help them decide as quickly as they want to: but you're never pushing them faster than they actually want to go.

Free things

Now your potential buyer is aware of you, it's time to offer something helpful which requires no investment (and very little effort) on their part. They are still exploring whether you are trustworthy, so you build on their awareness level by being helpful in a practical way. The key at this stage is to be helpful simply because it's the right thing to do and because you have expertise people need. If you are being helpful purely to "monetise" your audience, this comes across in your marketing and prevents building trust. To avoid this pitfall, give away information, and charge for implementation.

When you create information applicable to anyone, give it away. Write a blog post, record a video, create a guide, and share it. When they need to talk about how this information applies to their situation, charge for that. The more free information you give away, the more chargeable work you can do. Instead of repeating the same types of things to every prospect in endless meetings, you only meet with those who are ready to receive a proposal. If they're not ready, the free content is there, quietly building trust.

The "shiny object syndrome" is classic for accountants when it comes to marketing. It's hard and discouraging to press on day after day writing blogs, attending events, sending emails, and being visible on social. You want *results*, and you want them *fast*.

A firm owner I was speaking to once got all excited about Facebook ads. He said, "Someone in a group I'm in told me they did some Facebook ads, and they got two new leads per week! Let's do Facebook ads!"

The best kind of marketing places you in front of the highest quality prospects and leads. The problem is, this kind always takes time. You can accelerate the process by spending more time or money, getting support, or involving more people, but at the end of the day, you are going to have to go through the hard slog for a little while.

Let's go back to the firm owner considering Facebook ads because he wanted to *get sales*. The first thing he did was link the ad for his firm to an enquiry form. This form asked for a name, company name, email address, phone number, and other information to arrange a meeting. Unsurprisingly, he got a grand sum of zero leads from that Facebook ads campaign. That's because he was trying to skip steps within the progression model. He was going from zero awareness ("I've never heard of this firm") to sharing personal information and pushing for a sale ("I'm ready to buy"). Back at the pub, it's like someone saying "Hey, I got you a drink," and

before you can even take a sip, they've invited you back to their place. Bit creepy, mate. Think I'll go move over here.

What worked better for this firm owner was running a new Facebook ad, directing the visitor to a blog post. The firm chose a blog they knew to be popular, and it had been shared with many clients and prospects. No personal information was required to access it. There was no investment at this stage, simply good content helping the visitor get to know the firm, spend a little time on the website, and create trust. The firm then retargeted those same people with another invitation, this time to a webinar on a similar topic as the ad they clicked. At that stage, the registration form asked for a name and email address. As a result of doing this, their retargeted group was sitting at eight hundred people instead of zero.

Here are types of free things you can share. You can mix and match these a bit; for example, you might include a link to a template in a blog post or include a video on a website landing page along with a PDF guide.

- PDF guide (industry guide, tips on a particular topic)
- Blog post (answering a question they have)
- Video (screenshare of how to do something)
- Unique landing page (specific to their industry or business)
- Downloadable template (a tool they can use straight away)
- Event (on a topic they care about)
- Webinar (providing specific tips and help)

You can also download the Buyer Progression Model guide for more ideas at wearepf.com/buyer. (See what I did there?)

By this stage, your prospect has gone from being unaware of you at all to vaguely aware to building a little bit of confidence and trust. They've downloaded a few things, attended a webinar, registered for an event, and spent time on your website. You'll be tempted to rush it at this point, thinking, "Yay, they downloaded this PDF! That means they're ready for a meeting." That could be the case; but it's even more likely they're still gathering information. Let them go at the speed they want to. At this stage, your biggest mistake will be to try to skip stages again. Be ready with a small paid thing they can buy when they want to test the waters.

Small Paid Things

Let's go back to how this feels from the prospect's perspective. Back at the pub, you've been chatting with the same person for a few hours. You get on brilliantly, know all the same film quotes, and enjoy the same drink. You've let them buy you a drink or two. You're interested in moving on to something beyond the pub, but you're not at full relationship level yet. It's not time for them to break out the engagement ring. With a personal relationship, the growth in trust involves spending more time together, maybe going out on Saturday afternoon, hanging out with a group of friends, or getting dinner. You're committing to more time, trusting yourself with the other person in a small way.

As the firm owner, in your marketing, you follow a similar approach by offering a small paid thing: a service or product. There's a little investment on the prospect's part, but they can still back out if they're not ready.

Few accountancy firms truly offer something at this stage. You want people to sign up for accountancy services with monthly payments, and some people will be ready for that. But what can you offer those who aren't quite sure yet?

A great example is a firm we worked with at PF. This firm wanted to run a free event. The owner's goal was to get more clients working with him on strategic advisory services, not just getting their accounts and taxes done. He did everything right when it came to content marketing; he created a website landing page, embedded a video, shared social media posts, sent emails, and made phone calls. He built awareness and then offered prospects something for free.

What he did next was go properly through the progression model. He didn't skip from the free event to asking people to sign up for a monthly retainer. He offered a small paid thing: a one-on-one planning session charged at £300. Out of the sixty-five people who attended the event, thirty-three of them signed up for the £300 paid session. It's very likely many of those thirty-three people will end up signing up for more services eventually. Some won't. But he's letting his prospects follow the progression model and sign up for what they want when they want and when they feel comfortable. Here is a list of some small paid things you can offer:

- *A workshop or planning session:* This needs to be structured and clear with a defined deliverable. Your prospects need to feel confident you aren't simply having a chat; they're going to come away with something no matter what they end up doing next.
- *A paid event:* If you've invited them to a free event, the call to action (CTA) could be buying tickets for a follow-up event, one which is more intensive and focused. You could run a webinar about an online accounting app, then invite attendees to sign up for a training session to get the app set up for their business.

- *Consultative time for a niche:* If you have expertise in a particular area, open your calendar to a certain number of paid sessions with those who need advice relating to that area. This could be tax planning for property owners or a profit review for IT companies. If they won't pay for a small session, they may only be looking for free advice, which is available in your free content!
- *Online training or course:* This is often proclaimed to be an easy way to make money. You take all the knowledge you've been sharing for months or years, combine it into a structured course, package it up on a website, and voila! Instant leads and money flowing in day by day. Before you go all in, keep it simple. Record some videos, share them on a web page, and find out if it actually helps people before you turn it into an intensive course.

Now, at last, it's time for what you were hoping for from the beginning: the monthly services, the annual accounts, the recurring fees, the client relationship, or the big project. At this point, the client can go either towards a project, a retainer, or both. They might even back and forth between them. Let's look at the retainer first.

Monthly Retainer

You're no longer in the pub. You've spent time together, gotten to know each other, and it's clear something is really happening here. The key at this stage is to continue to be patient and not get lazy. It's exciting at the start of a relationship, and you'll do anything for them and they for you. And then time goes by, life happens, and things get a little harder. Maybe it's not as exciting as it was in the early days, or communication stalls a little.

You may feel like you've got this stage covered, and in terms of delivering a great service, it's likely you have. But keep the Buyer Progression Model in mind. As the buyer moves through this stage, you must continue to be the person you were at the beginning. Be helpful, be generous, look for ways to support them, have a laugh, and enjoy their company. Go beyond the basics every accountant provides, and look for ways to help your clients by providing events, training, advice, and helpful resources. Offer more within the retainer services you're providing:

- *Bookkeeping, credit control, and payroll:* Make sure they're aware of every kind of service they need when they need it. They may only have one or two services to start, so schedule regular service reviews or experience reviews. As a side note, I don't recommend calling them "fee reviews" because if they do show up, they'll come expecting you to push them into services they don't want or need.
- *Masterclasses and coaching:* Offer high-level support and training so they are continually being educated and they get accountability to implement true change in their business. These could be paid, free, or a combination, and your offering can move prospects slowly through its own progression model.
- *Community groups:* When you serve an industry niche or a group of like-minded business owners, you have the opportunity to connect them to each other. This could be a free thing, if you simply set up the group and let them network together. If you decide to charge for it, you could provide exclusive events, resources, and one-to-one meets.

At last...wedding day has arrived.

Big Project

You've gone from meeting a stranger down at the pub to being two people ready to trust each other with their lives. In the same way, your prospect has gone from someone who never knew your accountancy firm existed to a place where, no matter what happens in their business, you're the first one they come to. This includes mergers and acquisitions, legal support, investment and funding, building new systems, buying property, and major tax planning. Whatever they need, you're the one they'll come to for the rest of your business relationship and often for the life of their business.

This is where most accountants shine. You've already got the relationship, you talk to them regularly, and it's so easy to sell a big project because it's not even really selling. They mention a need, you tell them how you can help, and they buy. Job done.

But, as we talked about in the previous stage, don't get lazy. Because they may need...

More Things

This stage brings them right back round to the beginning—to awareness. Instead of general awareness of your firm, they now need awareness of the other services you have so they ask about them when they need them. What new services are you continually offering? How are you changing the reports you create, the apps you recommend, or the specialists you connect them to? Do you have new team members with a particular area of expertise your clients need?

It's dangerous to leave clients to move along at a comfortable pace, doing what they've always done and getting what they've always gotten. It's even more dangerous to focus your interest in the next shiny prospect and leave existing clients behind. Existing clients will buy more and faster because they trust you. Do you have a system for them to hear about what's

available when it appears? Are you clear about what's included/involved? How can they sign up when they need it?

You can build awareness for your existing clients using the following methods:

- Sending emails specific to niche areas or demographics
- Running client-only events or sessions
- Providing extra resources and free stuff only your clients have access to
- Taking them to dinner, lunch, or a fun event
- Sending thoughtful gifts, something relevant to what they care about (not a generic mug or coaster)
- Creating a community group, channel, or forum
- Ringing them up to ask how they're doing, listening to the answer, and taking action afterwards
- Looking for businesses or people to refer to them

There you have it. The Buyer Progression Model, from nothing to everything, in all its stages. Let prospects go through the progression at their own pace. It is *their* model, *their* progression. Some will leap directly from awareness to a big project. Others will stay at the free things stage for years and years before they move on. It's their call. All you can do is influence and direct them so when they get to the point they need you or need more, enquiring and buying becomes the easiest thing in the world.

So who exactly are you talking to? Who is *your* buyer?

How do I define my audience?

The more specific you are about your audience, the better. Yes, I know it's a risk. You may be concerned about who you might lose. What if you're so specific that an amazing potential client never gets in touch because the message isn't specifically directed to them? What if the message is directed to someone else entirely?

The only way this will happen is when your message is still too broad, too generic. When your message has been crafted for the type of people you want to work with, the really amazing ones, it will *always* appeal to that audience. Your message could even say "accounting solutions only for dentists," and you'll still get a few people or businesses who say, "I know you say you work only with dentists, but I really love what you do and your style, and I wonder if you'd work with me?" (It happens to us at PF from time to time.)

Before you panic about sending people away, ask yourself if that could be a good thing.

I once spoke with the owner of a firm who wanted to get into content marketing and social media but felt he didn't have the budget. At the end of the conversation, he mentioned he was spending almost £1,000 per month on Google PPC ads (pay per click). He said he got a lot of leads from it, so I asked how many.

"About twenty or thirty per month," he said.

"And are they the best kind of the leads?" I asked. "The highest quality clients? People who like you and your firm and are ready to do work with you and pay you the money?"

"Probably one or two of them are that kind of client," he admitted.

If you're worried about sending people away, you're still accepting everyone. You're so open you get tons of leads, but they're not ready to buy from you yet. Wouldn't it be better to invest your marketing budget in a way that delivered three to four amazing leads every month who are ready to buy now rather than wasting your time on twenty to thirty leads who are not a good fit? Think about when a prospect turns out not to be the best fit for your firm. Think about all the time you invest in replying to emails, setting up calls, having calls or meetings, sending proposals, and following up. Maybe they didn't realise the investment they'd need to make and what kind of value you're offering. Maybe they were just looking for free information.

Your specific, focused audience is like a bouncer. A security guard. Its job is to protect your business from the riffraff, the time wasters—anyone banging on the door and hoping to be let in but who will only bring chaos to you and your team. Let your marketing do its job and qualify people out for you while allowing the right ones to come at their own pace on their own time. This protects you from “salesy” marketing and helps the buyer to feel their freedom of choice. Marketing flows like white water rapids; prospects have a lot to choose from, and they only notice so much. People don't read every piece of marketing material you share.

This is one of the biggest mistakes accountants make in marketing. You spend hours and hours on that blog post. You take and retake the video until it's absolutely perfect. You spend well over a year editing every tiny word and letter and colour on your new website. Then you publish. And you wait in eager anticipation. And you forget your amazing piece of content is simply one of a million messages zooming past your buyer in a day. Part of the river rapids.

They're flicking through these marketing rapids at top speeds on their phone, on the go, often doing six other things at the same time. They skim. They forget. They save information and never go back to it.

Don't panic so much about alienating prospects when your bigger concern is simply being seen.

Let your audience filter through what you share and see the big picture of who your firm is through your brand and style, your people, your niche (or focus areas). Then let them decide whether they want to work with you. Rather than worrying about turning people away, flip the question on its head. Ask yourself, "*How* will this alienate people? *Who* will this alienate?" Make sure your content alienates some people and wins over others. That's its job.

You cannot be all things to all people. No one is, and you won't succeed with that philosophy. Be who you are. Share what you want. Turn away the people you don't want and win over the ones you do. Let them decide if they like your firm or not. Your content and marketing do not have to be perfect. Embrace the imperfection with this mantra: "Not perfect but done."

Not perfect but good. Not perfect but visible. Get your content out there. Be seen, and let your audience decide.

When you think about defining your audience, perhaps you imagine a "buyer persona.". You create a list of all the qualities you want in the clients who come to you. Sometimes this is called a client avatar. You might even have this written down already. Perhaps you imagine a target with a literal bull's eye in the centre, and your "target audience" as one you shoot your marketing at, hoping it hits.

Perhaps you imagine a niche, an industry on which you'd focus all your efforts. You might feel nervous about this because you like the variety you have already, but there's a lot of advice out there saying a niche is the most profitable and you have to pick one. You wonder if it's true.

The simplest approach to identifying your audience is to be as specific as possible.

Review existing clients

If you have an existing bank of clients (at least fifty or one hundred), you've got a great starting point to review and look for patterns. If you're new or small and don't have a bank of clients yet, think about the qualities you *wish* your ideal client would have. Review your client list with these three questions in mind:

1. Do you *like* them?
2. Have you delivered great *results* for them?
3. Is this client *profitable* to you?

Let's look at each of these questions individually.

Likability: How much do you like this client?

You could use a scale from one to five, one being "I wish they would go away tomorrow" and five being "I wish every client I had was like this one." Rank them for likeability because you want clients you enjoy working with. I'd even go so far as to say you need to *love* them, but let's start with at least liking every single client you work with.

Once you've ranked them on likeability, ask yourself: "Who's my favourite client right now?" Think of their first name and bring that particular person to mind. What is it you specifically like about them? The list can include the following:

- Personality traits
- Motivations
- Their way of doing business

- Communication
- How and when they pay
- Things you talk with them about

This is the start of your list of perfect clients, the audience you will be marketing to. We've created an Accountant Marketer workbook which will help you document and track everything you're learning in this book, and it's available for download here: <https://wearepf.com/am-workbook>. Add your list of perfect clients to this workbook.

Results: What level of results have you delivered for this client?

While you want to like working with your chosen audience, you also want to be sure you are valuable to them. The more you can define the results you've helped deliver for a certain type of client, the more you have to share in your marketing which will appeal to that kind of client. As they review your marketing they will be wondering, "Could I work with this firm? Is it possible they could help me?" Think about profit increases, goals achieved, and tax savings. Consider companies you've helped with growth, scaling, pivoting, and retirement.

You can also ask yourself, "What characteristics does this client have which contributed to their achieving those results?" Are they particularly motivated to learn what their numbers mean? Do they have a particular kind of business, or are they in a certain age range? All this helps define your ideal client type.

If you want to focus on a new type of audience and you don't have results yet, make those results your highest priority. Work with one or two clients in the category you want to expand into, and help deliver results for them. Until you have results to share, it's going to be harder for this kind of audience to trust you.

Add these types of clients to your workbook.

Profit: How profitable is this client to you?

Now we come to the third question, and you need all of these three questions to work together. It's not enough to merely find a client likeable; you can like a client you make no money from. It's not enough to get them great results if they don't do the same for you. Look at your client (or list of clients) and identify their profitability to the firm. You may need to ask a few questions:

- How do you calculate this profitability? Is it consistent? How often do you track it?
- What services do they receive from you?
- What services do they not receive? Are there any they need?
- How profitable are each of those services to you? Do you know?
- How profitable is this client's business to them? If it's not profitable, what makes that difficult? (i.e., what qualities do they have which make their business and profitability struggle?)
- If they are profitable (to themselves and to you), what qualities help that along?

Now you've done all this, it's time to look for patterns.

Look for patterns in the list

Review your client list, and look at all the qualities you've noted down. Pay particular attention to the clients you really like, got great results for, and are profitable to you. What patterns do you see? You could look for connections in the following categories:

- Industry
- Type of business
- Location
- Number of owners
- Number of employees
- Sales
- Product lines/complexity
- Qualities of owner

On the flip side, you can also ask yourself who you do *not* like. Go deeper than your gut feeling. Write down specific qualities, such as comments they make when you send a proposal or jokes you don't find funny. Consider anything you wish was different about them. How do they compare to the clients you love?

Once you've found patterns in all of the above qualities and characteristics, pull them together in a list.

Compile the very best qualities in a list

Now you have a list, choose the qualities on that list which represent the kind of clients you absolutely love, the ones you want more of or the ones you wish every client was like.

To streamline your list, you could play "winner stays on." This means you start with a full list of all the qualities you like or want in the clients you work with. Then look at the first two qualities on your list and ask, "If I could only have one of these, which one would I keep?" and strike out the other. Then take the winner (the one you chose), compare it with the next item on the list, and ask the same question. Once or twice, you will hit a point when you absolutely

must keep both, in which case they both win. Do this all the way down the list until you are left with the very best list, the very best clients, the people you absolutely want to work with above all else.

This resulting list of qualities is sometimes called your ideal client, your avatar, or your buyer persona. It doesn't really matter what you call it. What matters is being absolutely specific about who you will work with and who you won't.

Compile the “other” qualities too

You can also have a list of the undesirables—qualities of people or types of clients you won't work with no matter what. If you don't feel strongly about this yet, you can simply create a list of qualities which aren't your favourite. It can take a while to create a list like this, and you may feel a little badly when putting it together. You may feel you're saying this is a terrible, horrible, no good, very bad person that every accountant, or every person, needs to stay away from. When someone is that terrible, there's no question about it. If you do have any of those, I'd expect you to be in the process of getting rid of them if you haven't already done it. What you're facing in this exercise is something much harder than identifying someone who is truly terrible. You are separating the “good for me” from the “not good for me.” Maybe they are a good person or a good business. That doesn't mean they're good *for you*.

Your undesirable could be someone else's perfect client. All you're saying when you make this kind of call is you're choosing not to work with these kinds of clients. Whether this comes down to an industry, quality, or personality trait, it's entirely your call. You get to decide, and you get to change your mind too. If later you find out you were wrong, you can add them

back to your list, although your list usually starts bigger and gets smaller and more specific all the time rather than the other way round.

The more specific you are about your audience, the faster they buy

Being specific about your audience helps them as much as it helps you. The more specific you are, the easier it is for them to decide whether they are going to work with you. For those who already wanted to work with you, it hurries along the buying decision. For those who weren't sure, it helps them make the buying decision. And for those who are not a fit, they weren't going to work with you anyway (or would have been a very difficult client), so you've successfully helped them go on their merry way to find the firm who is right for them.

When you are all things to all people, being very broad in your marketing, it takes longer for the potential buyer to make a decision. It's also more likely you'll take on difficult clients who take time, energy, and money from your team, which makes marketing even harder than it was before.

After all, you don't simply want *more* leads (or at least I hope you don't). You want better ones who are ready to buy, and this means you need to be more discerning before you start your marketing.

Now you have a clearer idea of who your audience is (or have begun the process), it's time to dig deeper into what they're experiencing and how they feel. Even when you are clear about who you serve, it's likely you're thinking more about your services than about the issues your audience is facing. When you turn your attention from seeing them as a prospect and start thinking about them as a real human person with real-life issues, it changes your marketing for good—for the good of your audience and for the good of your firm.

Share your
thoughts!

Send me a DM:

Instagram: [@karenlreyburn](#)

LinkedIn: [@karenlreyburn](#)

Email: karen@wearepf.com