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# MARKETING CHECKLIST: ACCOUNTING, BOOKKEEPING AND TAX PROFESSIONALS & COMPANIES

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## MARKETING CHECKLIST FOR ACCOUNTING, BOOKKEEPING AND TAX PROFESSIONALS & COMPANIES

Accounting, bookkeeping and tax preparation firms come in all shapes and sizes. While there are the big, international CPA firms, this is an industry full of small and independent accounting, bookkeeping and tax professionals in virtually every city and town across the United States.

With these professionals in mind, we have developed a marketing checklist designed for small and independent accounting, bookkeeping and tax professionals and companies. This checklist assumes that your accounting, bookkeeping or tax preparation firm has been in business for several years and is not brand new. This means you have many happy clients, you have a somewhat established name, you have a website and have an employee or team.

We also assume you want expand your business or rethink/improve your marketing to grow your business. Either way, you are looking for some insight and guidance to help you.

If that's the case, this **Marketing Checklist for Accounting, Bookkeeping and Tax Professionals and Companies** is for you. This guide will walk you through a process to evaluate several key elements of your marketing, and help generate ideas to create the foundation for a new marketing direction.

Here we go:

### 1. Define Your Target Market

Deciding exactly who you want your ideal customer to be, and making a plan to go after that type of customer, will have a big impact on the success of your business. Many accounting professionals assume their customers will find them, or think they can serve anyone, and overlook this very important step of intentionally choosing a specific market segment to go after.

If things are stale or you're not seeing many new clients walk through the door, one thing you can do is look at where you may have had success in the past. Don't hesitate to target a new, specific audience or industry and see how well you do. Since so many types of people and businesses need your services and expertise, why not work with the

type of people that really interest and excite you? Plus, becoming known as an expert in a particular industry can take your business to a whole new level.

Create a Target Market Profile identifying the key characteristics and needs of your chosen market. Your Target Market Profile will provide clarity to how you use social media and other marketing efforts to reach your existing or new audience.

## **2. Establish/Update your Website**

With your target market(s) clearly identified, it's time to make sure your website addresses the unique needs and interests of your target market. Your website is the backbone of your marketing. It's where your target audience will learn about who you are, your expertise and what you offer. It is important to have a professional website, with accurate, current information, and to pack it with engaging content directed expressly at your target audience.

Your website should reflect your brand, and can showcase your company culture. Remember that many (if not most) people will be viewing your website on a phone or tablet, so make it mobile-responsive.

Conduct a [Search Engine Optimization \(SEO\) audit/review](#) to ensure that your website has the right settings, keywords, tags and content so you are found by the important search engines (primarily Google and, to a lesser extent, Bing) for searches related to your target audience.

[Get a Free Website Performance Report from Endorphin Advisors](#)

Insure that [Google Analytics is installed](#) on your website. This free, powerful analytics tool provides data and detail on your website visitors and will inform your future marketing initiatives. Google Analytics data reveals exactly who is visiting your website, how long they are staying, how many (and which) pages they are visiting, where they exit your website, as well as more detailed data. This visitor information can help guide your content development and website design to increase your website traffic and lead generation numbers.

### 3. Focus on Digital Marketing

Take advantage of the fact that people are using the web for information and recommendations before making purchasing decisions. Use the tools available and be where people are already spending their time. The following digital marketing tools are especially cost effective with attractive returns on investment (ROI) levels, too.

**A) Social Media** – Choose social media platforms that offer the most value for your industry or type of business. For accounting, bookkeeping and tax returning professionals, we would typically recommend social media platforms like LinkedIn, Twitter, Facebook, Instagram and YouTube. It's important to understand that each platform is different as to what type of content works best, when it's best to post, and what type of audience is typically present. For best results, use a [social dashboard tool like Hootsuite](#) to aggregate all your social profiles into one dashboard and be able to schedule all your posts from one place.

**B) Email** – Studies repeatedly demonstrate that email continues to be one of the most effective marketing tools. Engaging content sent to the right people, at the right time, will keep loyal readers coming back and attracts new viewers. Consider [email automation strategies](#), too. While there are many benefits of using email marketing, remember that for every \$1 you spend on email marketing, you can expect an average return of \$38. That's a great ROI!

**C) Video** – All digital marketing today seems to [be moving towards video](#). Think about customer testimonials as well as videos explaining specific areas of practice, processes, etc. You can use a professionally-produced video, quick videos shot with a cellphone or a slideshow with voice-over. Remember, organizations that use video in their marketing grow revenue 49% faster than those that do not use video. Video can consist of professional video, live-stream video, or [Content-Driven Video](#).

**D) Content** – Content is king, and that includes social posts, blog articles, website content, ebooks, brochures, videos are more. Make sure your content is relevant, newsworthy and informative to your audience. Lastly, make sure your written content is also easy to read by using bulleted/numbered lists and graphics.

#### **4. Get involved in, and support, your business community.**

Business owners like to support each other. They also support businesses that support the local community. Consider joining local chamber of commerce or join the board of a non-profit association where you have an interest in serving. Either way, just getting involved in the community will definitely help in meeting new people and getting your name out there to the public.

#### **5. Planning & Measuring Success**

Building a successful marketing strategy does not happen overnight. Those who take time to create a written plan, do research, and regularly analyze data and performance metrics are more likely to reach their goals. Take time at the end of every month, quarter and year to look at the results of your marketing plan and initiatives (and all the data and analytics), and measure your progress. Are you improving? What can you be doing better? What will you do differently next quarter? Then set some new goals and get back to work.

There is a lot that goes into a new marketing strategy, but these five key areas should help you re-energize the marketing for your Accounting, Bookkeeping or Tax Preparation Firm.

**[Would you like help with your marketing? Please contact Endorphin Advisors](#)**



## ABOUT ENDORPHIN ADVISORS LLC

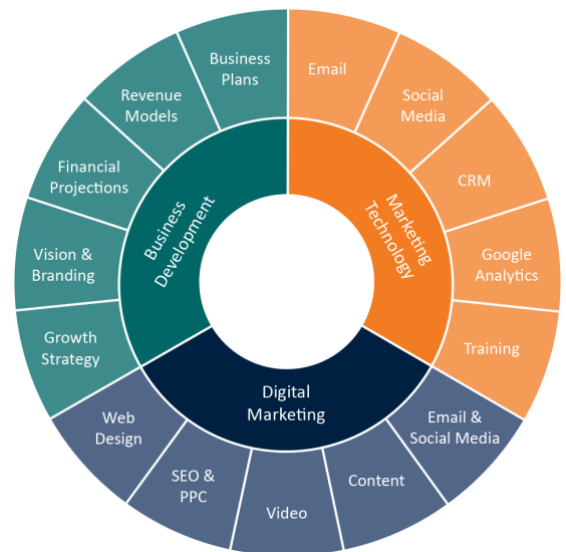
Endorphin Advisors LLC is a unique, full-service consulting firm offering strategy solutions and digital marketing services. Since 2005, we have specialized in marketing strategy, web design and digital marketing. We also offer branding, content marketing and strategic planning.

In marketing technology, we enjoy close working partnerships with industry-leading companies including Constant Contact, PromoRepublic, Results CRM, Abacus Next, APC Cloud, Robly, Hootsuite and more. These important relationships help us stay on the cutting edge of marketing best practices and technology innovation/solutions.

Our clients engage us for our knowledge of business, our passion for marketing and our love of technology. We specialize in working with professional services, technology and distribution firms.

We have deep expertise in the following areas:

- Web Design/Development
- Search Engine Optimization (SEO)
- Video
- Content Marketing
- Social Media
- Email Marketing
- Customer Relationship Management (CRM)
- Marketing Technology & Training
- Branding & Identity
- Growth Strategy & Business Planning



We invite you to request a free consultation with one of our experienced marketing advisors. Please contact us via email at [info@endorphinadvisors.com](mailto:info@endorphinadvisors.com) or by calling 518.250.9035.

Please visit us at [www.endorphinadvisors.com](http://www.endorphinadvisors.com).