

# ACCOUNTING MARKETING REPORT 2019

CREATED BY BIZINK

WEBSITES AND MARKETING FOR ACCOUNTANTS & BOOKKEEPERS



# INTRODUCTION

In 2019, Bizink surveyed 400 accounting and bookkeeping firms from across the globe. Our goal: discover what marketing the profession is doing and how it's working.

This report is an analysis of the data plus our recommendations on how firms can improve their marketing

## HIGHLIGHT CHALLENGES

Uncover challenges firms are facing with marketing and how they're overcoming them.

## SHARE INSIGHTS

Share statistics, methods and ways all firms can improve their marketing.

## INDUSTRY EXPERTISE

Industry experts have provided their tips to kickstart your marketing.

We hope you enjoy reading it,  
Matt and Anthea



**MATT WILKINSON**  
FOUNDER AND CEO



**ANTHEA MAJOR**  
HEAD OF GROWTH

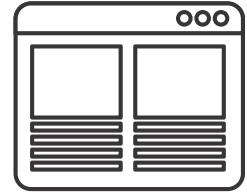


**Because the purpose of business is to create a customer, the business enterprise has two—and only two—basic functions: marketing and innovation.**

**Marketing and innovation produce results; all the rest are costs.**

**PETER DRUCKER**

# THE HEADLINES



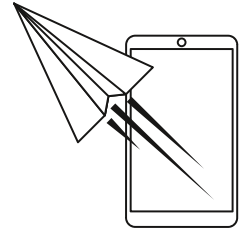
## MARKETING PLAN

Almost two thirds of firms DON'T have a marketing plan



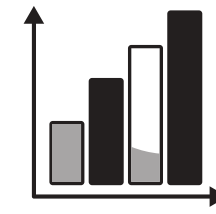
## SOCIAL MEDIA

Social media use is up 13% from 2014



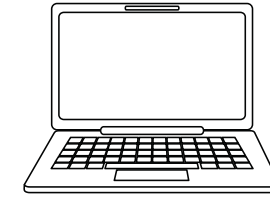
## TIME

"Finding time" is the biggest marketing challenge



## LEADS

19% of firms get NO leads each month



## WEBSITES

9% of firms still don't have a website



## NETWORKING

58% of firms attend local networking events

# THE CONTRIBUTORS



## GAYATRI WOOD

Marketing Manager, The Wow Company



## NICK SINCLAIR

Chairman and Founder, TOA Global



## JACLYN ANKU

Partner Education, Gusto



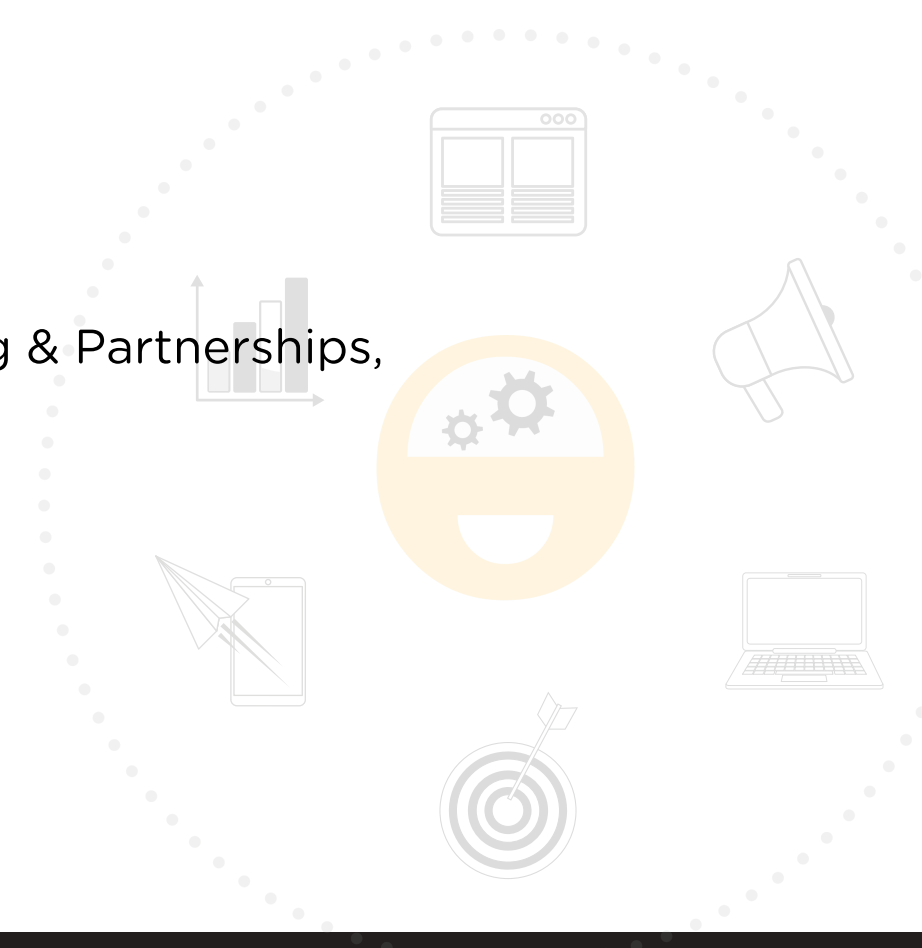
## TRENT MCLAREN

Head of Accounting & Partnerships, Practice Ignition



## MARK TELFORD

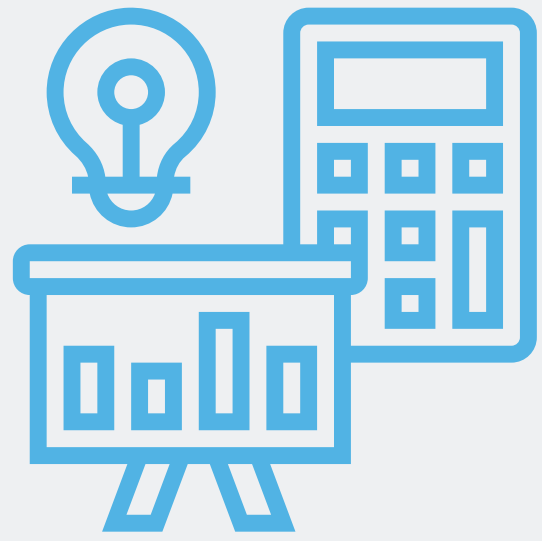
Founder, START! Accountants and Founder, Telfords Chartered Accountants



# WHO TOOK PART

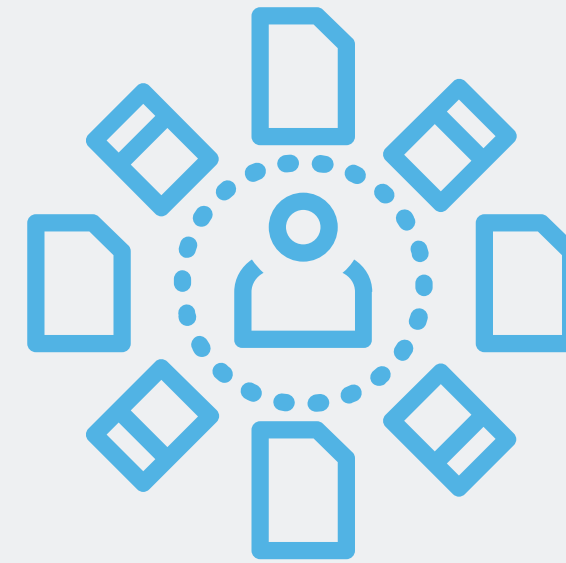
A huge thank you to everyone who took part in the survey. We really hope you find the results useful.

## TYPE OF FIRM



**57%**

**ACCOUNTANTS**



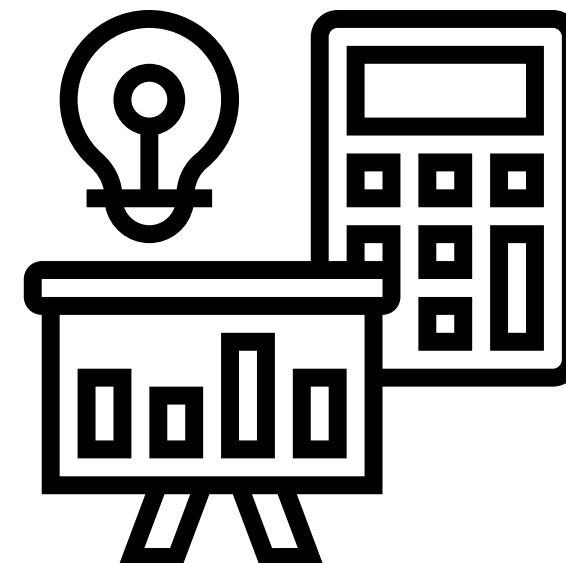
**43%**

**BOOKKEEPERS**

## NUMBER OF PRINCIPALS IN FIRM



## IMPORTANCE OF MARKETING IN THE NEXT 12 MONTHS



**33%**

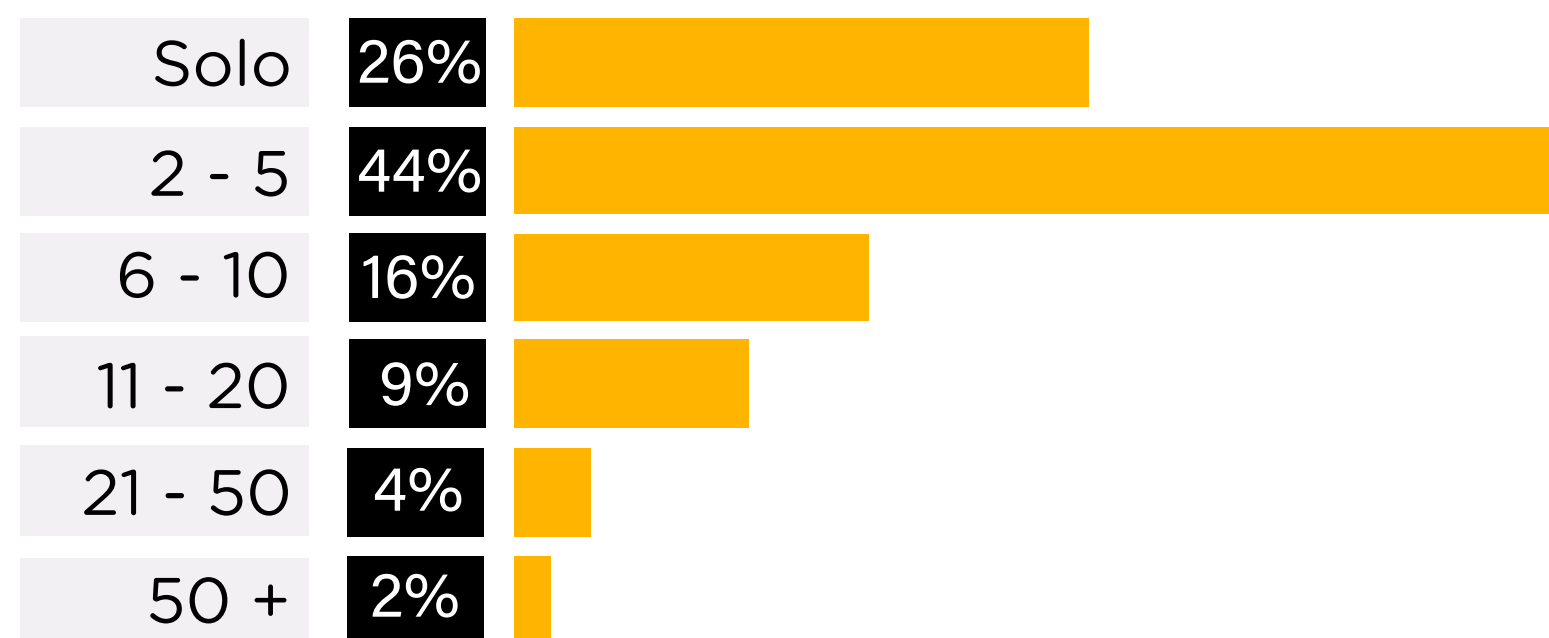
OF FIRMS RATED IT A 10/10

**82%**

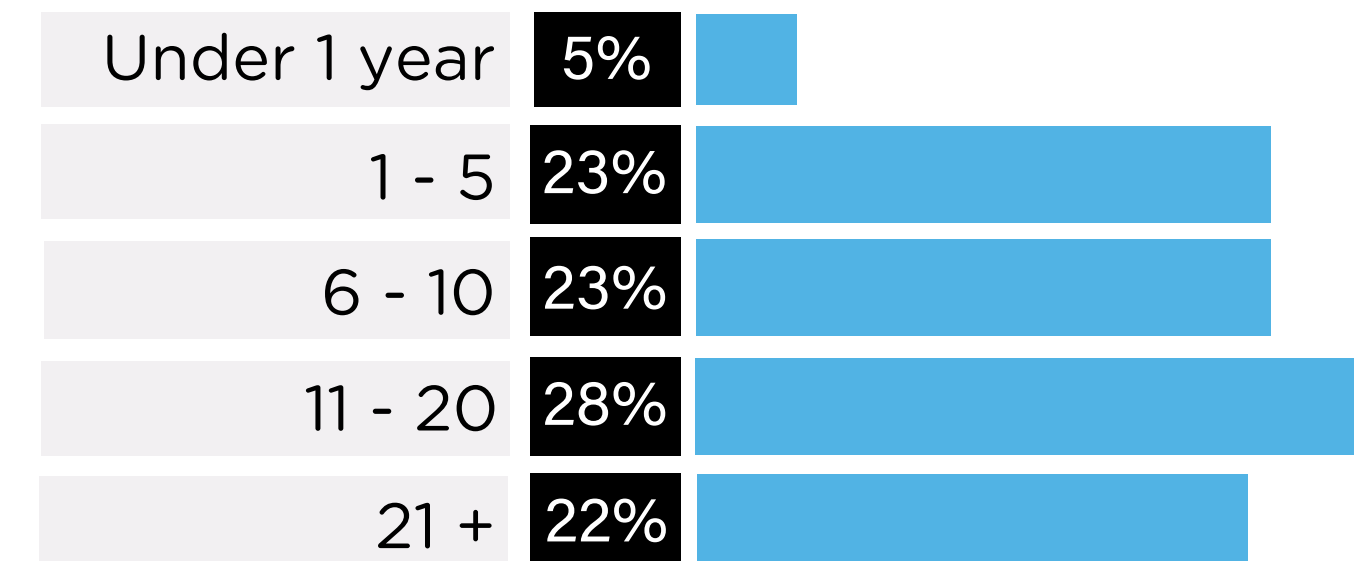
OF FIRMS RATED IT A 6/10 OR ABOVE



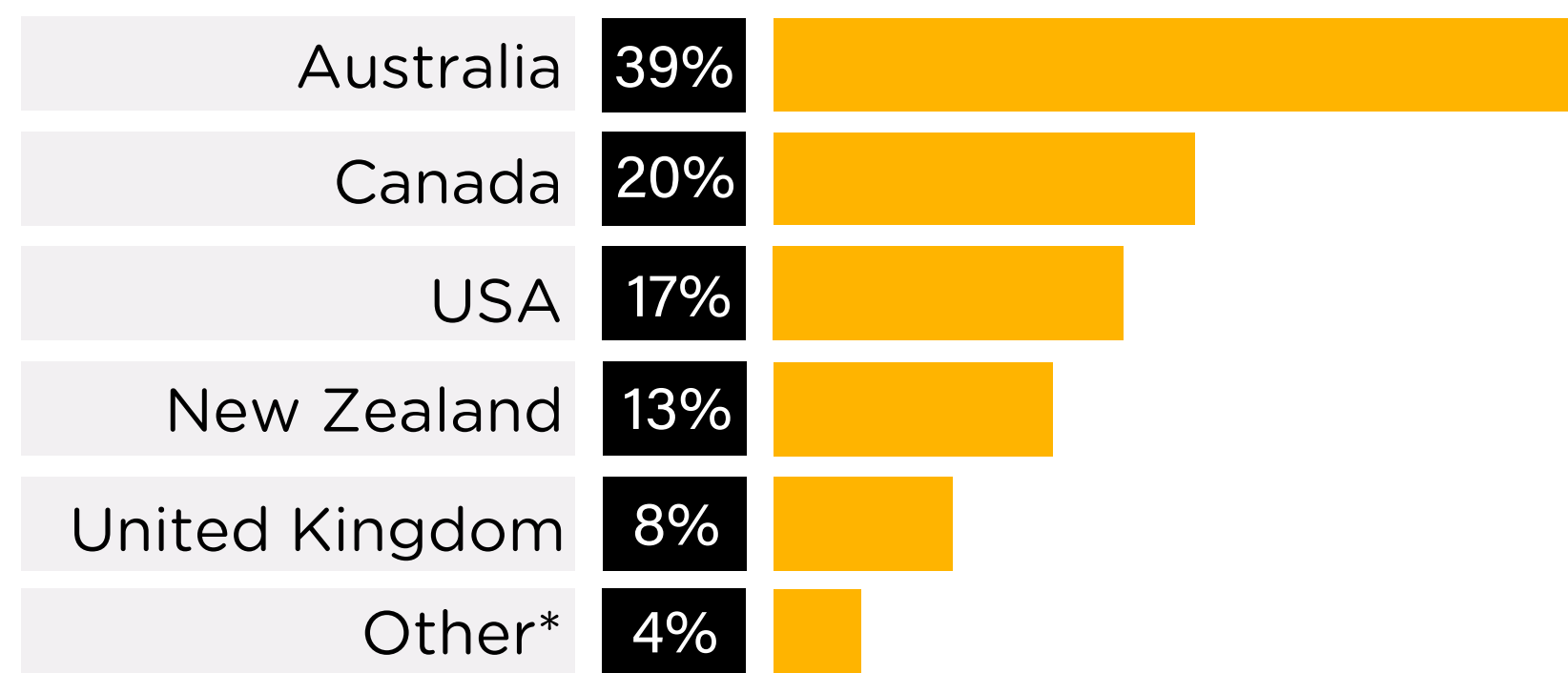
## WHAT IS THE SIZE OF YOUR FIRM?



## HOW MANY YEARS HAVE YOU BEEN IN BUSINESS?



## WHERE ARE YOU LOCATED?



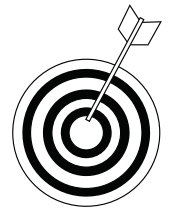
\*Asia, Africa, Ireland, Europe

**400  
FIRMS  
TOOK  
PART**

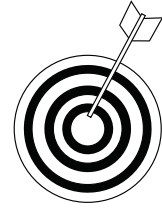


# 01 **Planning**

# DO YOU HAVE A MARKETING PLAN?



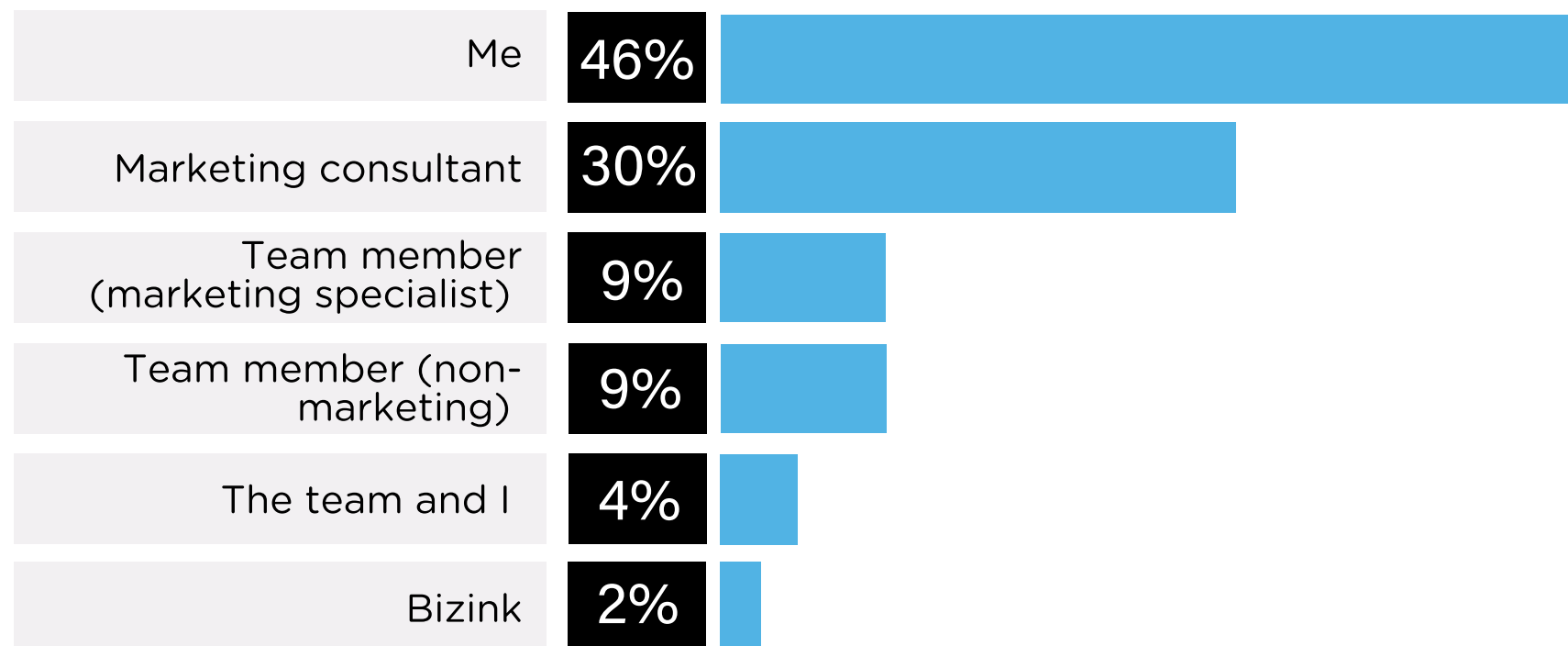
**YES 35.5%**



**NO 65.5%**

Almost two thirds of firms don't have a marketing plan. "If you fail to plan...", you know the rest. We don't believe many firm owners plan to fail - but if you don't have a plan, any marketing success you do have will be fleeting.

## WHO WROTE IT?



## THOSE THAT PLAN, KEEP IT UPDATED



**THIS MONTH 36%**



**IN THE LAST 6 MONTHS 40%**



**IN THE LAST YEAR 13%**



**OVER A YEAR 11%**

The hardest part is getting started. Your marketing plan doesn't have to be perfect, especially version one. Tweak and refine as you go along and see what's working and what isn't.

## DON'T HAVE A PLAN? THINK ABOUT:

### WHO'S YOUR IDEAL PROSPECT?

Marketing to everybody is marketing to nobody. Work out who's your ideal prospect and focus your marketing on them. You'll save time, energy and your marketing will be more effective as it's targeted. In other words, you'll have a marketing strategy.

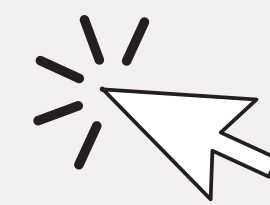
### MAKE THE NEXT 90 DAYS COUNT

A strategy is worthless without a plan to execute it. Create a simple plan which details the marketing you'll do for the next 90 days - and then do it! At Bizink, we use this simple template to do our high level 90 day planning. Download it and start working on your action plan.

## GET HELP

We've helped over 150 people create marketing plans for their firms. We'll help you put together a strategic and tactical plan to help you win more of the clients you'd love to work with.

Book some time to chat if you'd like us to help you.





# CREATING A WINNING MARKETING STRATEGY

Marketing and accountants. Two words that don't always mesh. You might think that marketing is limited to 'creative-types' or that you don't have the budget. In truth, marketing is more like business planning. A set of repeated tasks that you execute, iterate, and optimize, guided by a strategy and goals.

## FOCUSED

Like any good business plan, a marketing plan should be focused. Think about which types of clients are a best fit for your firm - whether driven by industry, geography, or stage of business. Having a well-defined target market will guide the tactics and channels you use to get the word out. For example, if you like serving food entrepreneurs, reach out to the local restaurant association to present at their next gathering. If you work with online retailers, join an industry Facebook Group and provide friendly advice.

## REGULARLY REVIEW

In the same way you review monthly client financials to analyse growth, costs, and trends, you'll want to review your marketing plan as well. Marketing plans are dynamic and will change as your firm grows. Initiating a planning process with status checks will keep the team on track and allow you to celebrate wins both big and small.

## EXISTING CLIENTS

Winning new clients is great, but keeping existing clients is the real gold. And why do clients stick around? Their relationship to you and the trust that's been built over time. Existing clients are a great source of new revenue. You can - and should - upsell them on advisory services, consulting packages, and... payroll? (Yes, you can call me biased).

## ALL FIRMS NEED IT

When it comes to marketing, firms that win are those that act. It's easy to put off marketing, or to think that you don't need it. All firms need it. Think of marketing as synonymous with communication. You always need to communicate to your clients, and to get the word out to new ones. Knowing where you want to go (strategy) and how you'll get there (tactics), will help you easily grow your firm and have fun doing it.

## EXPERT INSIGHTS

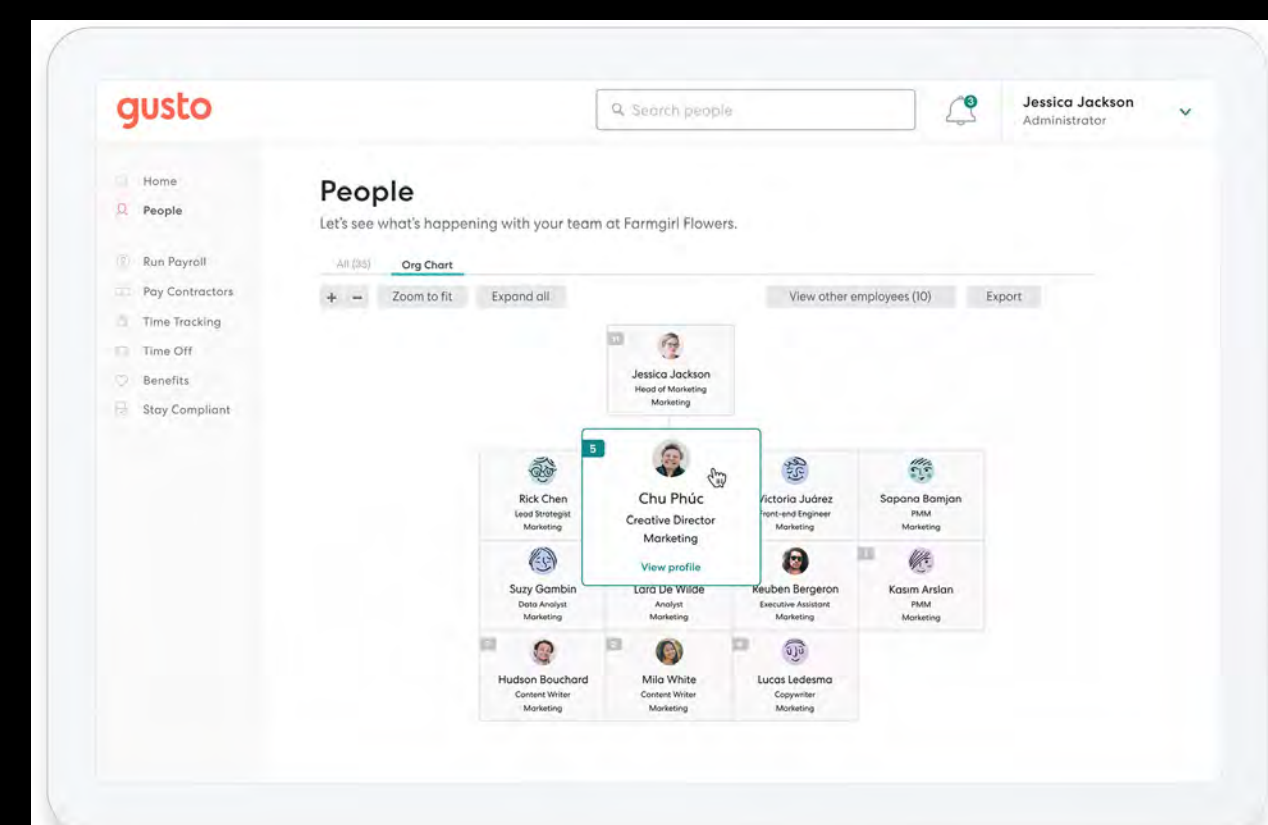


**Insights from Jaclyn Anku,  
Partner Education at Gusto**

## ABOUT GUSTO

Gusto's People Platform offers integrated full-service payroll, benefits, and HR to small businesses and their financial advisors.

Gusto automatically files local, state, and federal payroll taxes for businesses up to 100 employees. On top of that, they streamline benefits, provide direct access to HR experts, and so much more

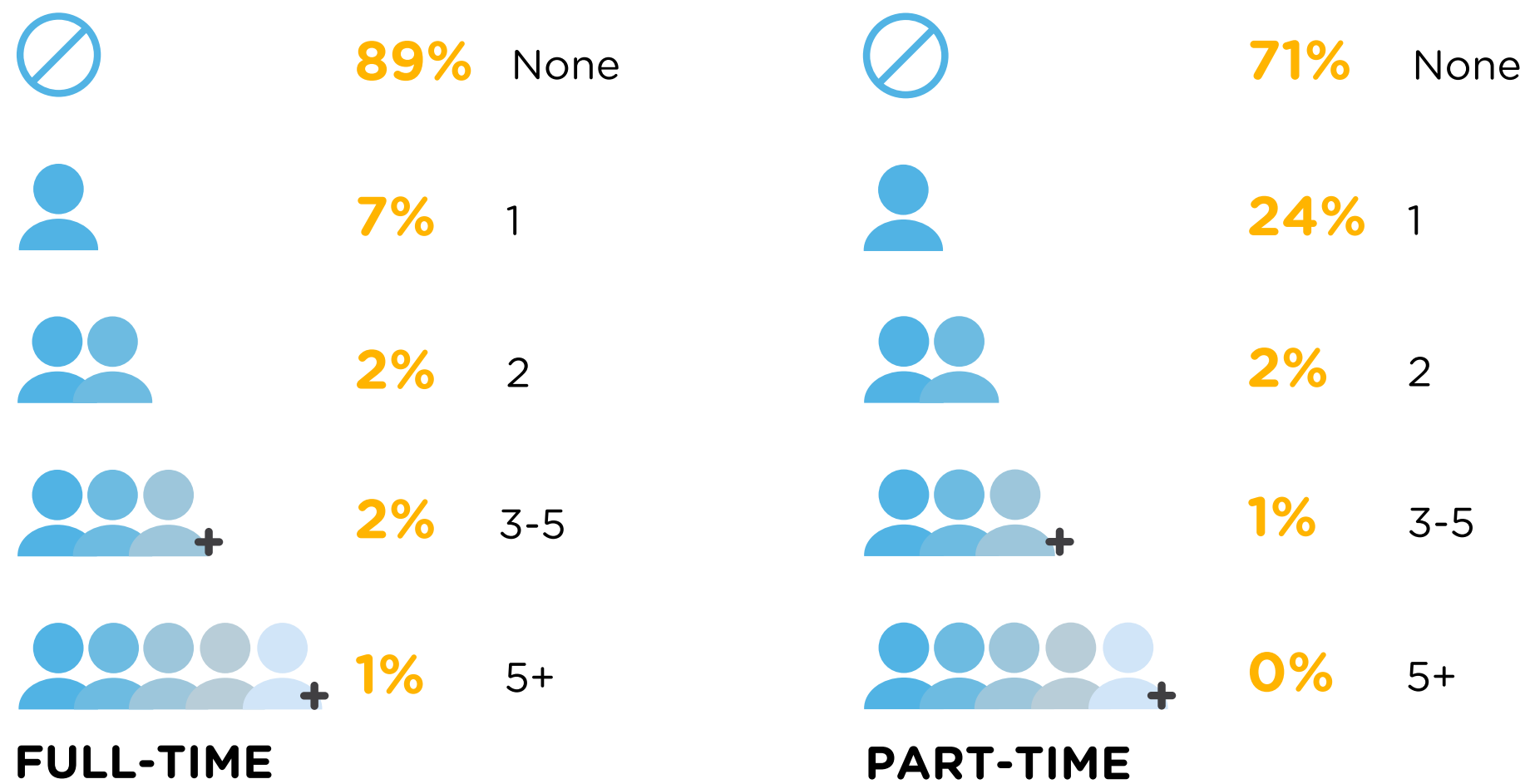


02

**Marketing  
Resources**



# MARKETING STAFF



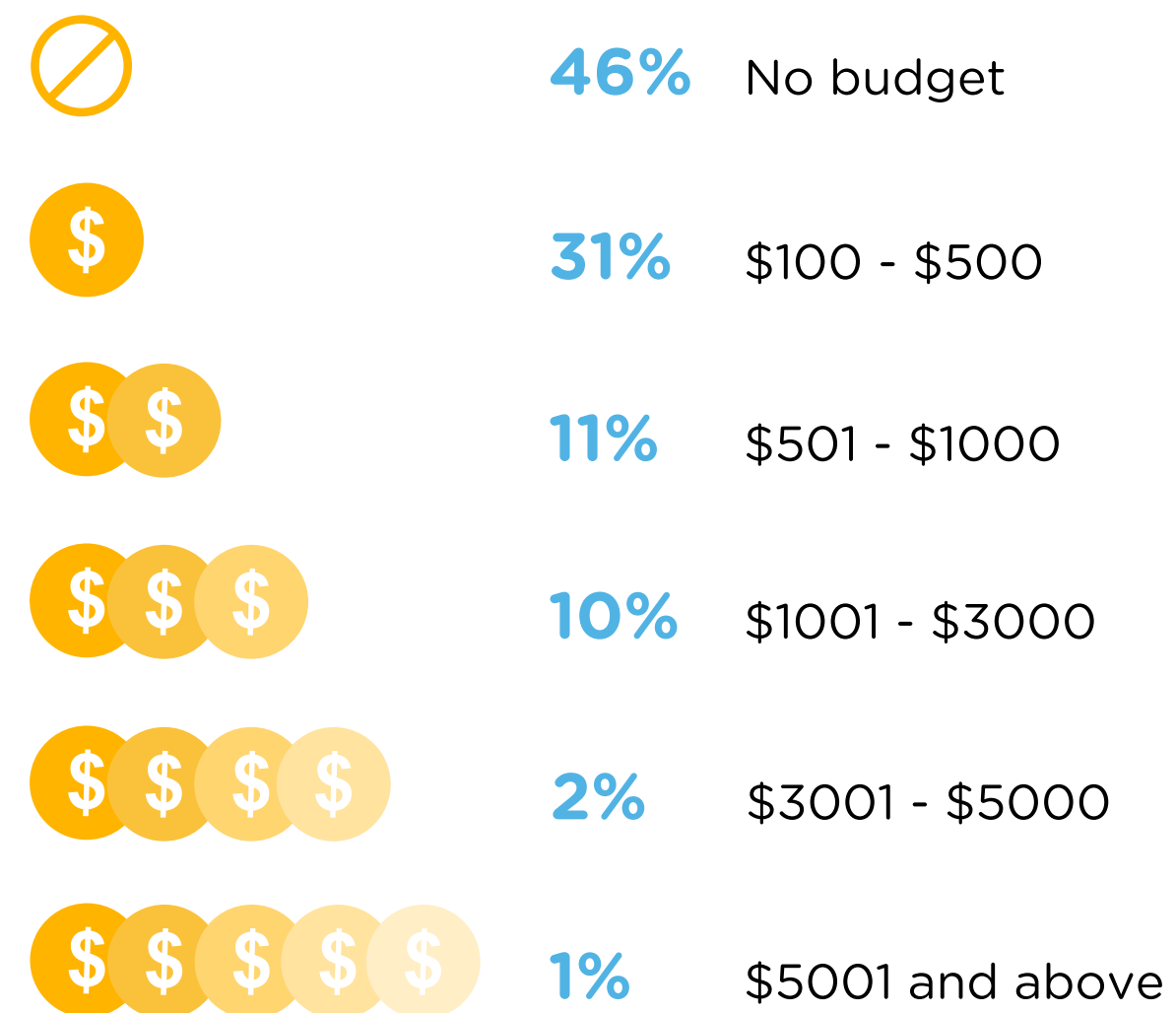
Given that most respondents were from small firms these results weren't surprising - 73.5% were single principal firms and 23.5% had two to five principals.

Perhaps we should have added a question - are you looking to grow in the next 12 months? Anecdotally, we know that many firms are but we also know firms that are scared to grow as they could not resource the additional work that new clients would bring.

Even if growth isn't desired, every firm should be marketing to its existing clients. According to Bain and Company:

- A 5% increase in customer retention can increase a company's profitability by 75%
- The average repeat customer spends 67% more in 31-36 months with a business than 0-6 months

# MARKETING BUDGET



More surprising was that 46% said they had no marketing budget. 31% had a budget of under \$500 per month. Only 12.5% are spending over \$1000 per month.

Clearly a budget of zero doesn't get any marketing happening unless you're prepared to do it yourself. And a budget of under \$500 per month won't fund much growth in today's market.

## WE RECOMMEND:

Accounting firms rely on high retention rates yet often do little to engage their existing clients. Set aside a reasonable marketing budget for communicating with existing clients. Show them some love and of course, try and sell more to them! They want your help and clients using more of your services are more likely to stick around.

# CAPACITY, MARKETING AND GROWTH

## CAPACITY

The capacity of a firm is its appetite for growth. Firms that are on top of their workflow are the ones who can ramp up their marketing and hire an employee. Unfortunately, the average firm is behind in their workflow. The average firm doesn't even think about marketing because they can't handle the work they've currently got.

We've even found some firms are scared to grow their firm because they don't have the capacity to do it. A lot of firms come to us at TOA to solve this problem and create capacity through offshoring, especially if they're based in high-wage jurisdictions like Australia.

## ATTRACTING MARKETING STAFF

Most small accounting firms can't attract and can't afford to hire a quality marketing team member locally. Often that's because there are no growth opportunities in the firm for them, so they're simply not going to be a long term employee. As a result, these firms go through the "rollercoaster up and down" of generating leads.

If they do find someone the next challenge pops up - do they have the right skillset? How does that team member implement if they don't have broad marketing knowledge?

The challenge with larger firms is often they do have a marketing person but they can't execute because they're buried under a pile of work.

## MARKETING ROLES

Many firms don't realise that marketing doesn't have to be looking for new clients. They often have strong databases of existing clients that don't know about all their services - that's the low hanging fruit! What most firms need to do to start with is simply be present to their existing clients.

## EXPERT INSIGHTS



**Insights from Nick Sinclair, Chairman and Founder of TOA Global**

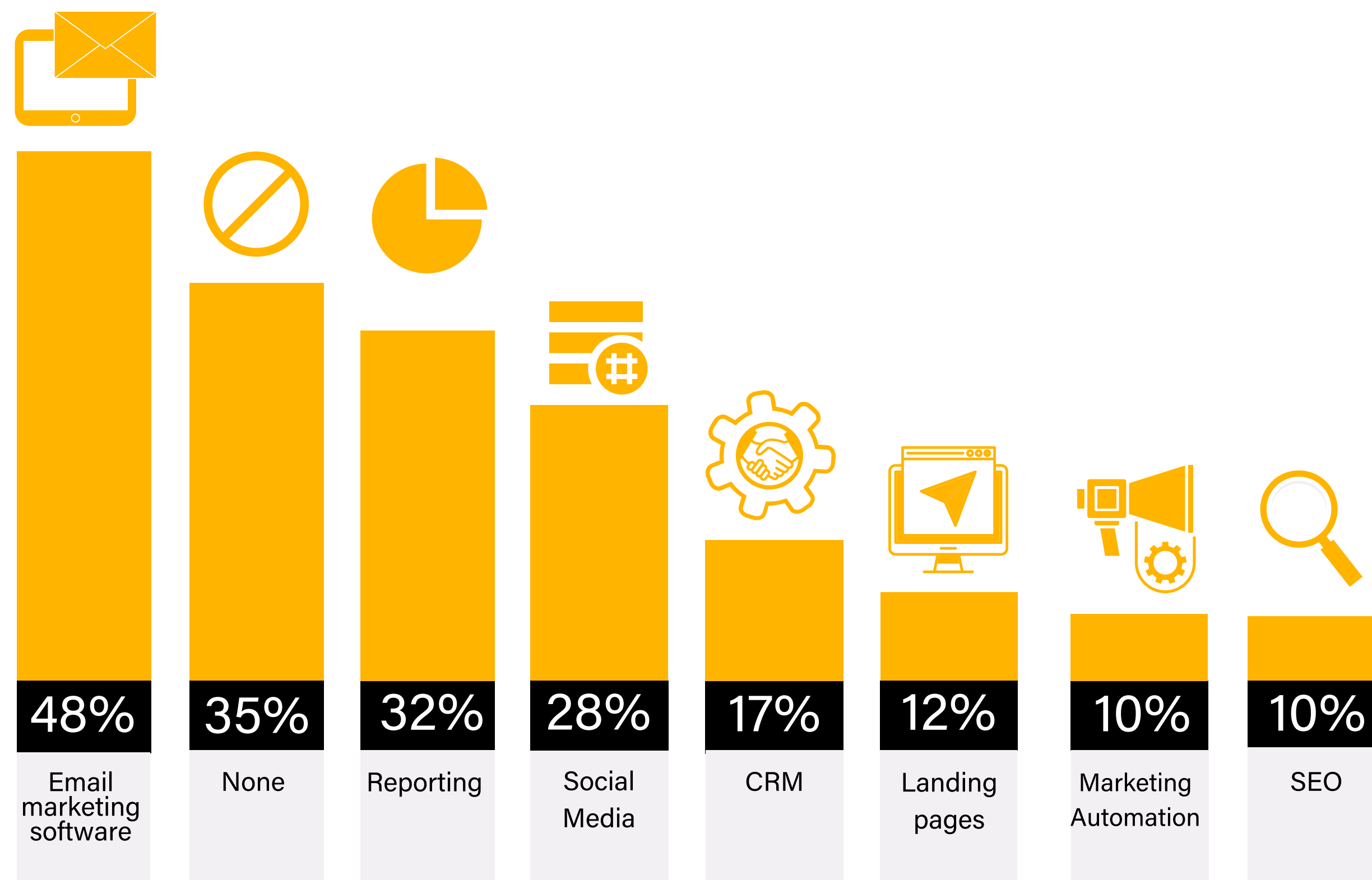
## ABOUT TOA GLOBAL

TOA Global is a leader in outsourcing solutions for accounting firms. Our eco-system provides people experience, professional development, technology, security, peer-to-peer community, social impact and leading-edge facilities.





# DO YOU USE ANY OF THE FOLLOWING MARKETING SOFTWARE?



## 35% OF ACCOUNTANTS USE NOTHING

The modern marketer relies on apps so how do 35% of firms market without any?

Of those using software, email marketing was the most popular. This is pleasing as email marketing's excellent performance should make it essential for every firm.

For most B2B companies, a CRM is an essential for managing leads and customers. Accounting firms generally have practice management software however most practice management tools don't incorporate sales and marketing. We wonder how the 83.5% of firms without a CRM are handling things like their sales pipeline?

Firms using no marketing software were the worst performers in terms of leads generated. 25% generate no leads

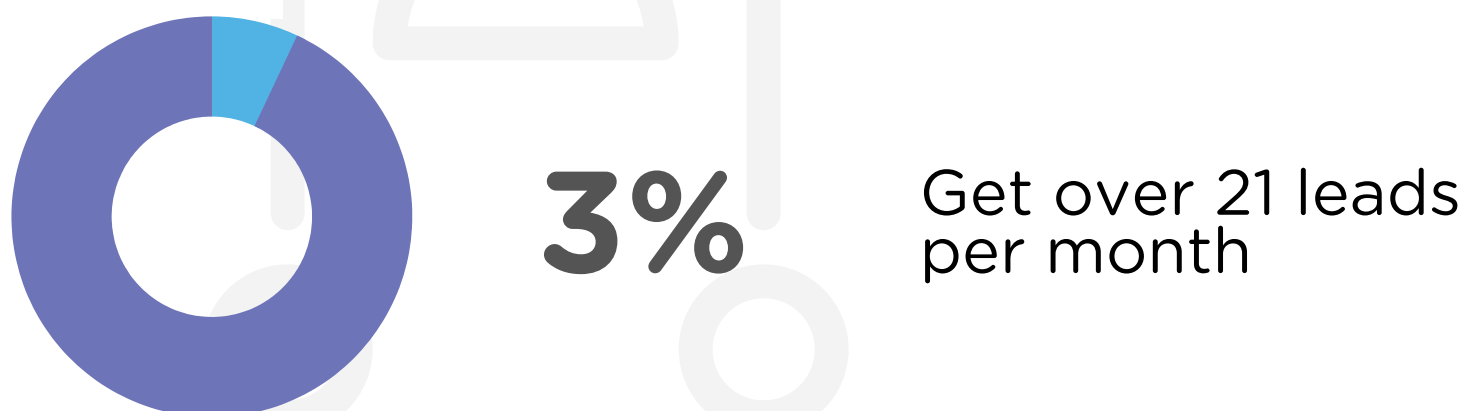
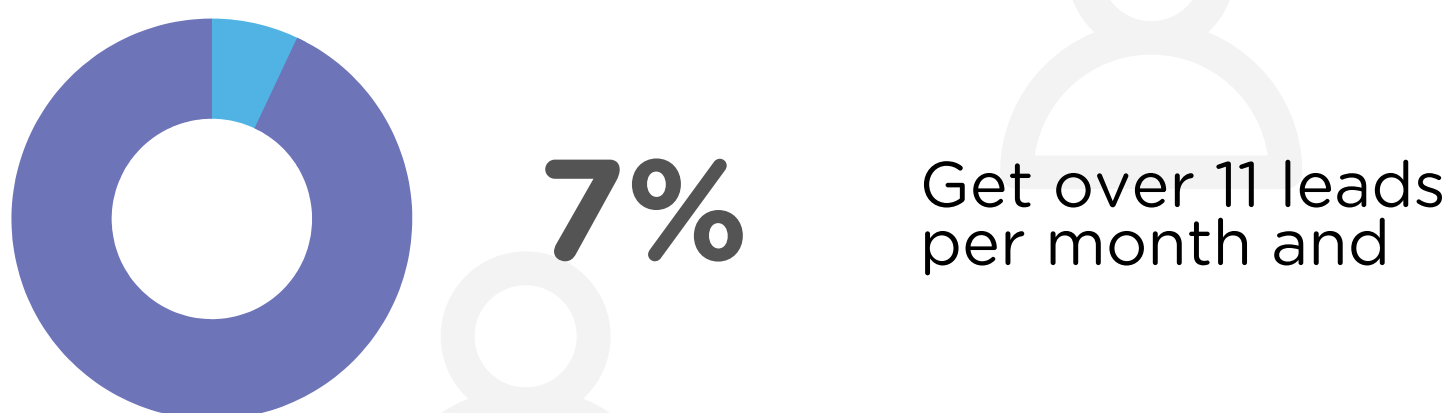
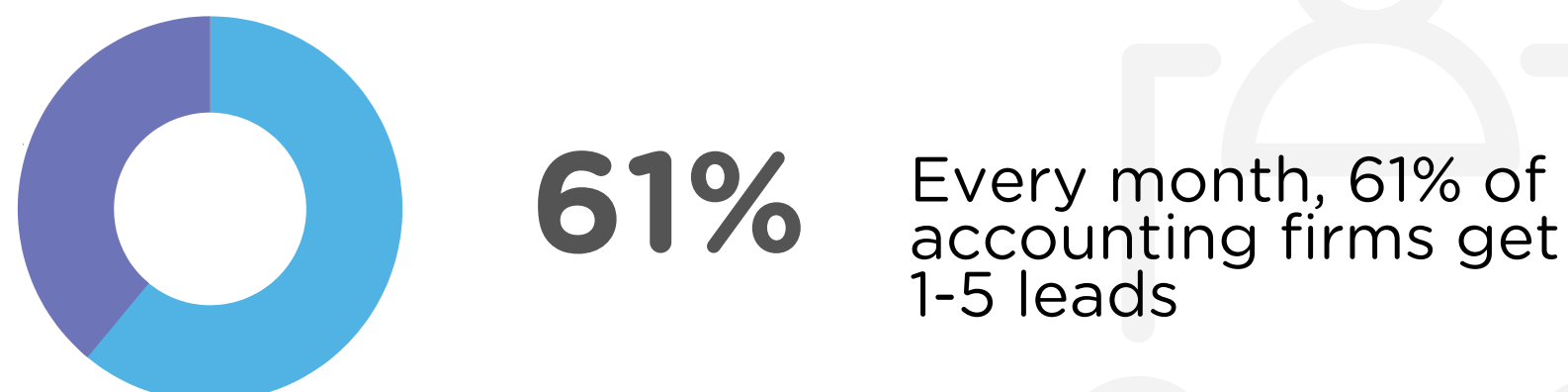
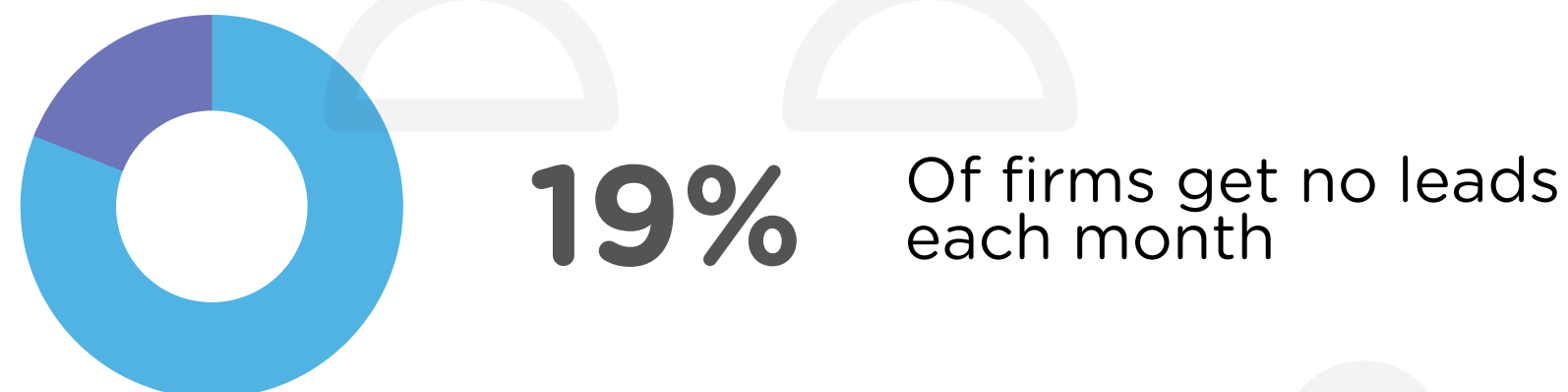


# 03 Leads

# NUMBER OF LEADS

Leads are the lifeblood of business-to-business marketing. Clicks, visits and likes mean nothing without leads.

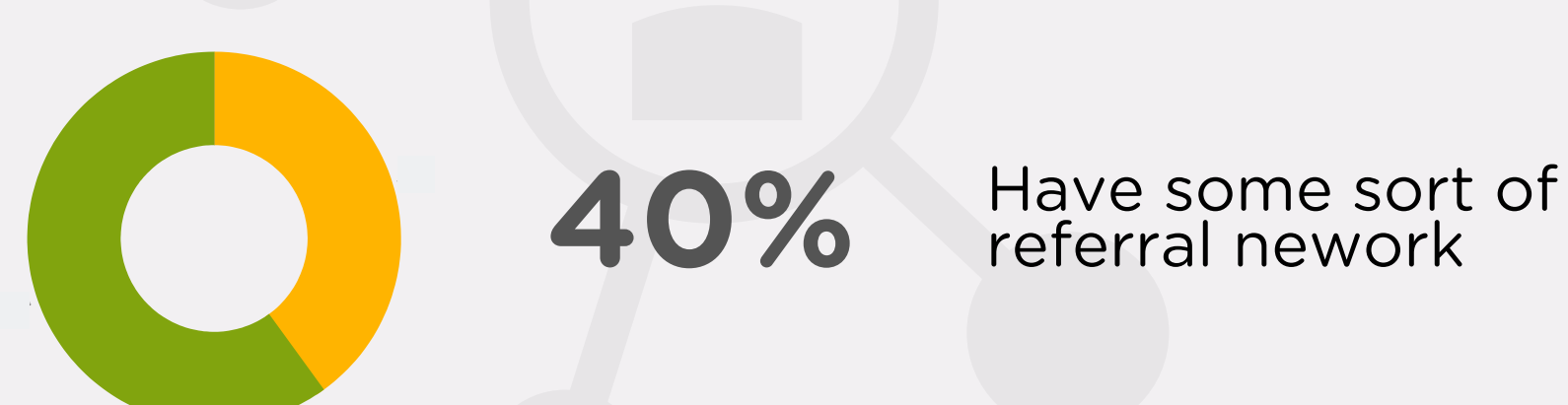
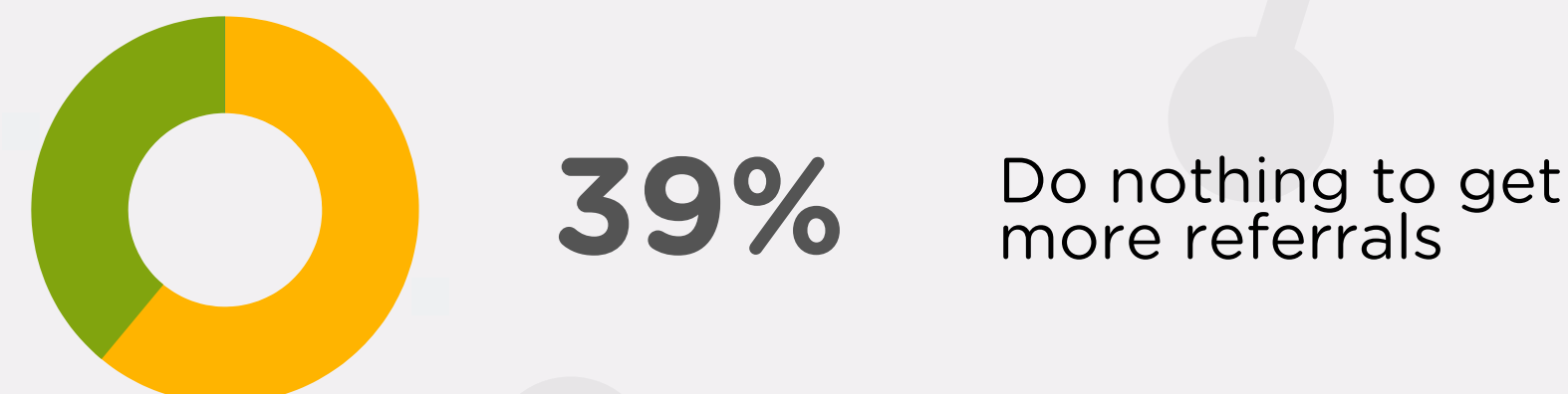
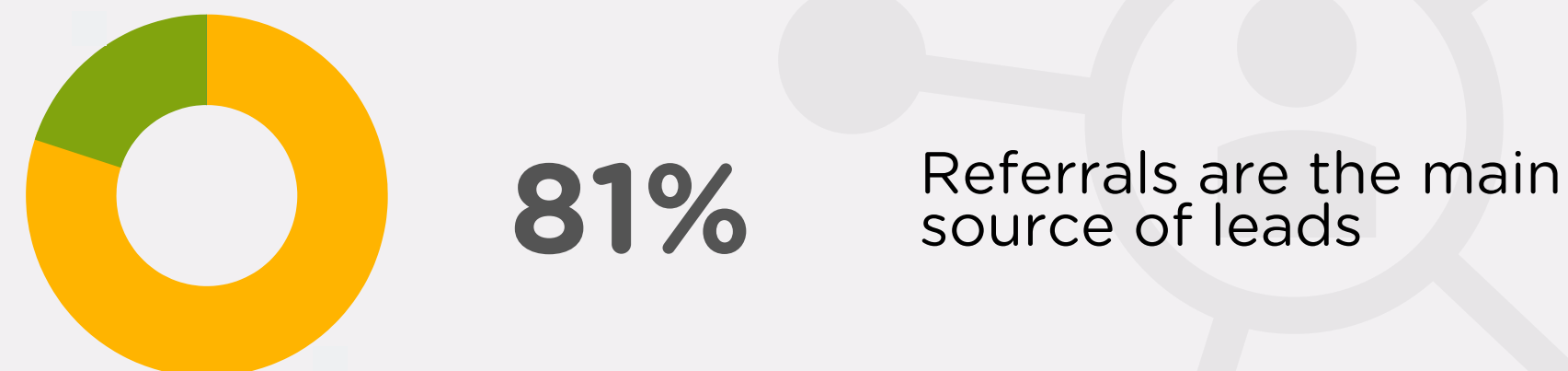
The most popular response was one to five leads per month which applied to 61% of firms. 81% of the firms we surveyed get five or less leads per month. We drilled deeper and found that the number of leads went up with the size of firm.



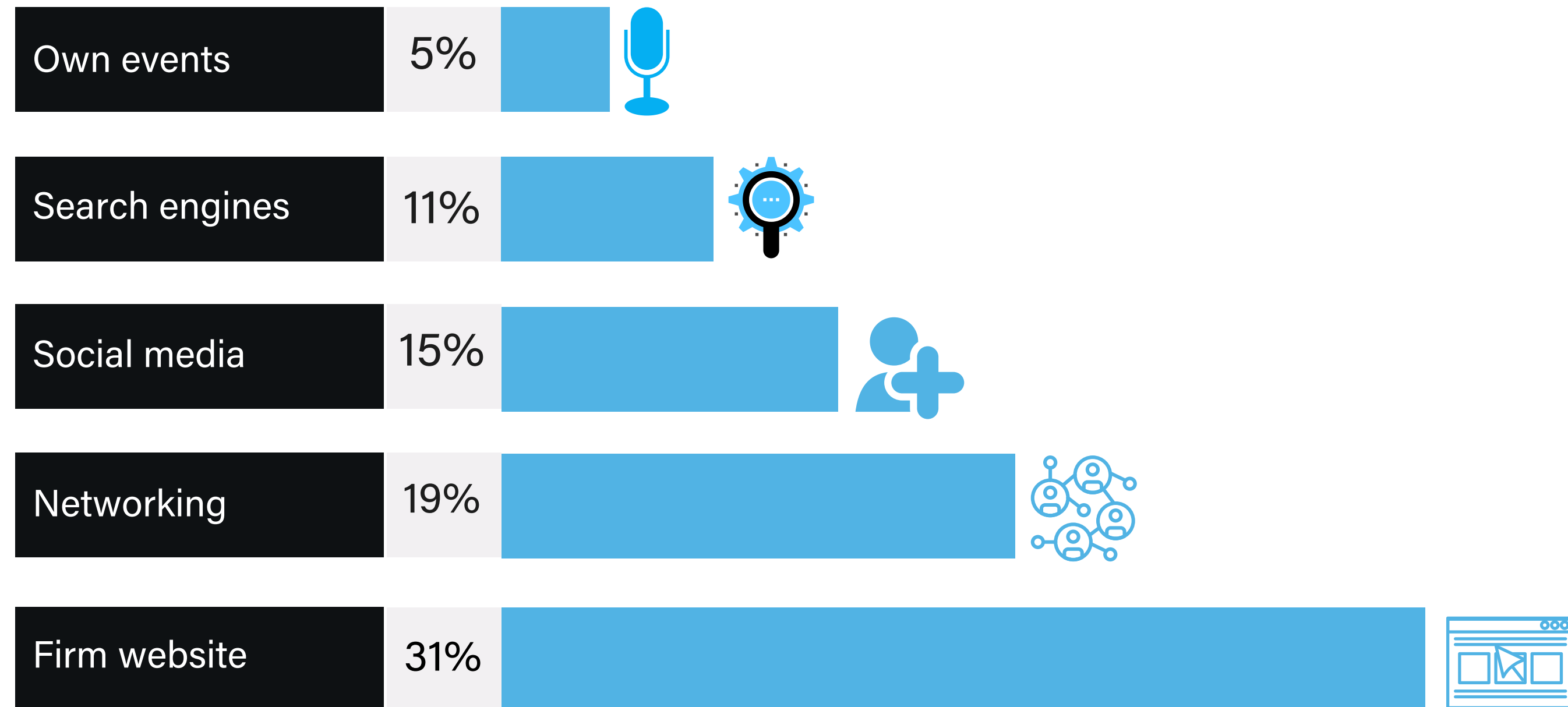
# REFERRALS

Word of mouth is and will always be the way most firms win new business. So it's no surprise that for 81% of firms, referrals are their main source of leads.

Given the importance of referrals, we asked firms what they do to get more of them. Most firms ask their existing clients for referrals - why wouldn't you unless you aren't serving them well?



# OTHER THAN REFERRALS, THE MAIN SOURCE OF LEADS IS



Out in front on its own was the firm website with 31% saying it was their biggest lead source after referrals. After websites, 19% said networking events were their best lead source after referrals. People buy from people and in a relationship led profession like accounting, meeting potential clients will always be important.

## AUDIT YOUR MARKETING

We've worked with hundreds of accountants and bookkeepers helping them with their websites and marketing. We'll use the knowledge we've learned from working with some leading firms to assess your marketing. We'll then present you with a report which includes actionable suggestions for improvement.

## SOME OF THE THINGS WE LOOK AT:

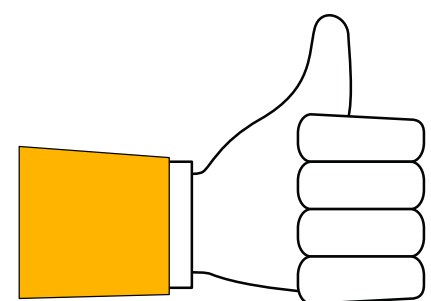
- How good is your brand?
- Is your website working properly?
- Are you marketing to existing clients?
- Do you attract and convert leads?



# 04 **Websites**

# DO YOU HAVE A WEBSITE?

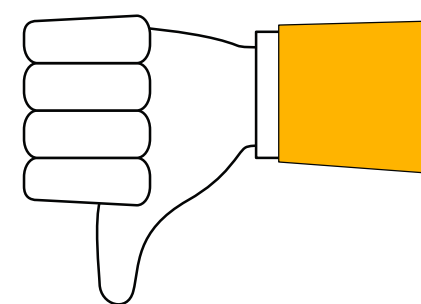
Marketing tactics fall in and out of fashion but a website is still at the heart of the marketing efforts of every successful firm.



**91%**  
**HAVE A WEBSITE**

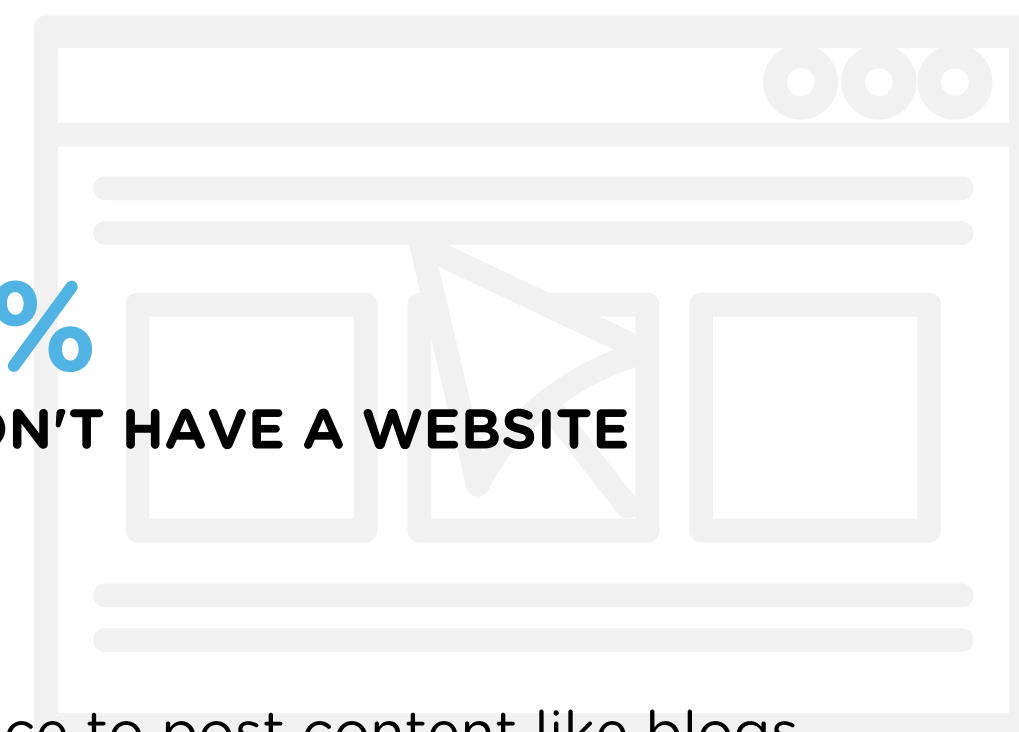
At its most basic, a website is the first place prospects, including referrals, will check out when doing their “due diligence’ and decide if they want to work with you.

They’ve been around for over 20 years now but don’t underestimate the power of the humble firm website!



**9%**  
**DON'T HAVE A WEBSITE**

Beyond that it can be a place to post content like blogs, capture leads through online forms, attract new staff and much more.



# WEBSITE VISITORS

Although most firms have a website, they aren’t getting much traffic. Accounting firm websites don’t need and are never likely to get huge traffic.



**65%**  
**< 100 VISITORS  
EACH MONTH**

With most firms getting under under one hundred visits per month, getting measurable results is going to be tough.

Even the best websites don’t generate leads on their own. Only a website with a healthy amount of the right visitors will get results.



**8%**  
**> 500 VISITORS  
EACH MONTH**

This means they will need to market to get people to their websites. The best firms use a mix of tactics to drive targeted traffic to their websites.





## WEBSITE AGE

In the 2000s, website technology and design trends were rapidly changing and websites dated fast. As the industry has matured, the general quality has improved and websites don't age quite as quickly.



**12%**

**WEBSITE IS OLDER  
THAN FIVE YEARS**

Only 12% of firms had a website that was more than five years old, down from 29% in 2014.



**53%**

**WEBSITE IS YOUNGER  
THAN TWO YEARS**

Over half of firms got a new website less than two years ago. It seems that accountants now value keeping this part of their business up to date



## WEBSITE LEADS

When we're building websites for firms at Bizink, we ask them what their goals for the site are. Leads is always top or high on the list.



**69%**

**GET LEADS FROM  
THEIR WEBSITE**

It's great to see that more than two-thirds of firms do get leads from their website. That's a big jump from 2017 when it was only 55%.



**31%**

**GET NO LEADS FROM  
THEIR WEBSITE**

Almost a third of firms don't get any leads from their website. We see two explanations for this which are not mutually exclusive. One - it could be they do get leads but they don't track them effectively. Or, these firms have a website or marketing that sucks!

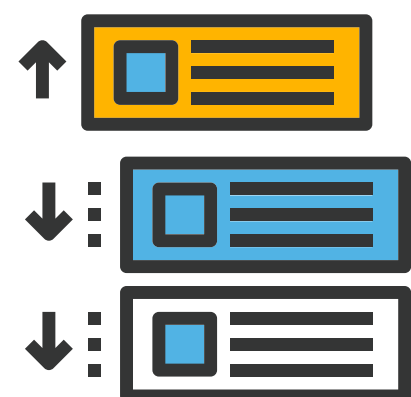
# HOW ARE ACCOUNTING FIRMS USING THEIR WEBSITES?



## BROCHURE 31%

The primary use for three quarters of firms was a brochure. While this might seem to undervalue what else a website can do, its role as a place to store information on a firm like its staff and contact details should not be underestimated.

# WHAT ELSE DO THEY USE IT FOR?



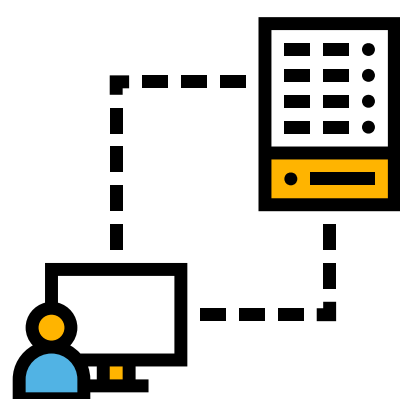
## PUBLISHING CONTENT 13%

Publishing content on your website is closely linked to marketing campaigns. We would've hoped that every firm published a least a blog or two a year and ran at least a few marketing campaigns.



## MARKETING CAMPAIGNS 8%

This could be as simple as emailing existing clients about a new product or service. The investment is little more than time but the results can be significant.



## CLIENT ONBOARDING 7%

Using your website for client onboarding and workflow automation is a great opportunity to save time and create longer-lasting client relationships. We've seen our clients save hours using our online onboarding forms, online surveys and workflow automation features.



## WORKFLOW AUTOMATION 4%

A slick online onboarding experience sets the tone for a durable relationship. How many clients would prefer to fill in something e by hand, scan and then send back versus doing it quickly through a secure page on your website? Delivering a great online experience can be a big point of difference.

## WEBSITE AUDIT

We've worked with hundreds of leading firms, helping them with their websites and online marketing. We'll assess your website and present you with a report which includes actionable suggestions for improvement.



## SOME OF THE THINGS WE LOOK AT:

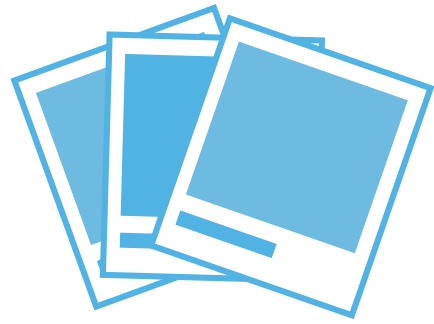
- Does your website generate leads?
- Is your website user friendly?
- Is your website working properly?
- Does your website feature good quality content?
- Is the website visually attractive?

# IT'S NOT ABOUT YOU...

The BEST marketing I've seen? When firms focus on their customers. A lot of accountants fall into the trap of focusing on themselves, rather than who they serve. It's always better if you can make it about them. But how do you do that?

Here are my tips:

## IMAGES



Get images of your clients and use them on your website and marketing material. Remember: a picture speaks a thousand words! If you're targeting the hospitality industry ensure your website has imagery that reinforces this.

## CASE STUDIES AND TESTIMONIALS



Don't be afraid to ask your clients for a case study or testimonial. I recommend you give them a call and ask them a few questions about the results they've seen from working with you. Then, turn that into content you can use on your website and in your marketing. Social proof is important and is always more powerful written from the business owner's perspective and language.

## CONTENT



I've written content for hundreds of accounting websites and it's always better to make it about the client. The best way to structure your content is to show that you understand their pain points and demonstrate how you can help, in simple language.

## VIDEOS



Videos are another great way to demonstrate your understanding of your clients while being able to show your personality and reinforce the ideal clients you like to work with.



## Insights from our Head of Growth, Anthea

## FIRMS ACROSS THE GLOBE CHOOSE BIZINK

First impressions count, especially online. So your website must look great and be viewable on everything from a smartphone to a widescreen monitor.

Every Bizink website is carefully crafted by our design team and built to be 100% mobile friendly.

The end result is a website that will set you apart from your competitors and be a source of pride for you and your clients.

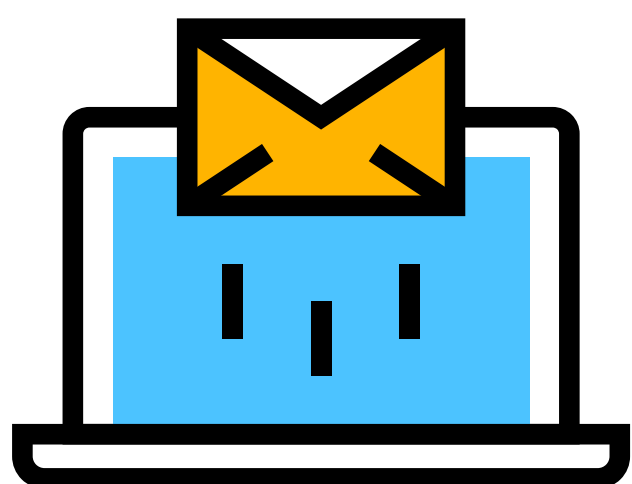


05

**Email  
Marketing**



# DOES YOUR FIRM USE EMAIL MARKETING?



50/50

There was a perfect split between firms that did and didn't use email marketing.

# WHAT TYPES OF EMAILS ARE THEY SENDING?





Unsurprisingly client newsletters were the most popular type of email sent. Only one third of firms send a newsletter to prospects though. This is a missed opportunity given the high ROI of email and ease of sending campaigns.


Few firms are sending promotional emails like email blasts. Ask yourself, do all your clients know about all the ways you could help them? If not, write down a list of your key services and products, write emails about them and send them to clients. Marketing doesn't get much easier!


## IF YOU'RE ONE OF THE 50% NOT, YOU SHOULD:

We're massive advocate of email marketing for accounting firms for several reasons:

 100% of business owners have an email address. Most check it several times a day.

 The return on investment for email marketing is \$44 for every \$1 spent according the Direct Marketing Association.

 Email beats social by 40x for customer acquisition according to McKinsey.

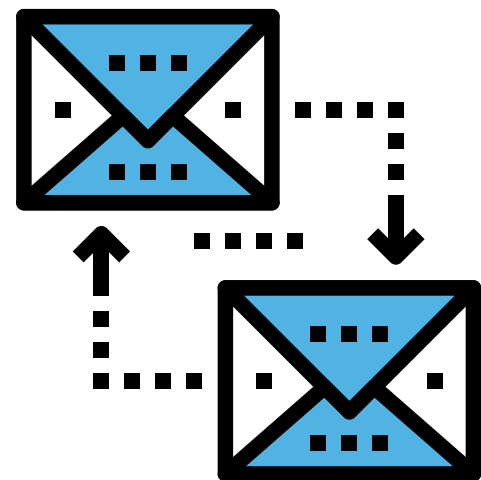
 People open emails from accountants. The average open-rate for the hundreds of thousands of emails sent annually by Bizink annually hovers around 40%. The highest performing category from leading email app, MailChimp, is 27.35%

## WHY IS IT UNDERUSED?

We're often told email marketing is "old fashioned" but so is putting on events, good customer service and having a good brand. The attraction to new shiny things is baffling when the old, tried and tested gives great results.

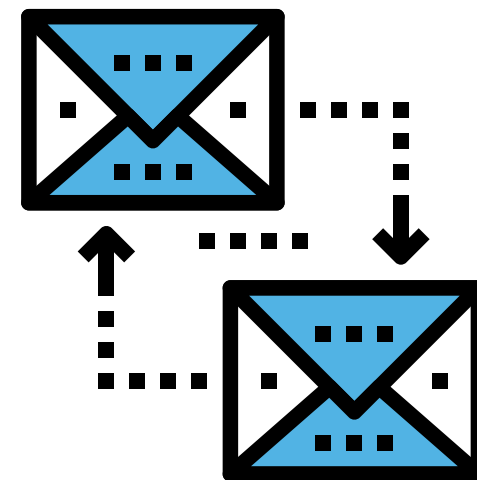


# EMAIL MARKETING LEADS



**57%**  
GET LEADS

Of those that send marketing emails, over half say their efforts generate leads. For larger firms, this rises to 71%, presumably as they have a full time marketing team member or higher budget.



**71%**  
OF FIRMS WITH 50+  
STAFF GET LEADS

Perhaps this is because the predominant type of email sent is newsletters, they don't contain calls to action or anything promoting products or services. Without a qualitative analysis of the emails, it's just speculation. But we've never come across a business that doesn't generate leads through email if they have a good database of prospects and send them emails about products and services they are interested in.

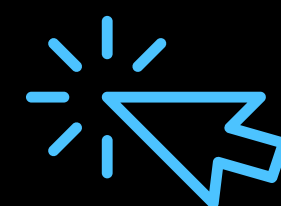
## DON'T HAVE A LIST OF PROSPECTS TO SEND EMAILS TO?

If you're not sending emails to prospective clients because you don't have a list to send emails to, you're not alone,

If you're in that boat, we did a webinar on how to build a lead database.

What you'll learn:

- How the truly successful firms do lead gen
- Why a leads database is crucial to your firm's marketing success and future value if you decide to sell
- The best CRMs for storing your leads
- Nine lead generation tips you can action right away



# EXCEL WITH EMAIL

Email marketing is an integral component of The Wow Company's strategy. Gayatri sends hundreds of emails and for clients they have 3x the open rate and prospects 2x the open rate of the best performing category for MailChimp.

## DEFINE YOUR AUDIENCE

Firstly, you need to have a clear idea of who your audience is in order to effectively communicate with them. It's a good idea to separate the messages you send to clients and prospects. Of course you may want to share the same thing with them, but how you let them know about it is different. Often prospects need more context and information as they don't have a cemented relationship with you.

## ALWAYS BE GROWING YOUR LIST

For clients, at what stage do you add and remove them to your client emails? Do you capture all of the people within the business you would like to email? Do you update your lists when people join or leave? For prospects, have an easy way for them to subscribe to your emails. Whether it's a simple form on your website, a lead magnet, simply asking them, or a combination. It's helpful to be specific about what they're signing up for and the frequency of emails. This sets expectations and lowers the chance of them unsubscribing.

## GET YOUR EMAILS OPENED

It's good to think about which emails in your inbox you open and which ones you don't when you're creating your own campaigns. What makes you want to open an email? Most people quickly scan the subject line and pre-header and decide. Are yours punchy and descriptive?

## SHOW YOUR PERSONALITY

Try and write the way you would speak to your clients and prospects while keeping in mind the personality of the people you're talking to. I see lots of accountants send very technical updates their audience can't understand. People will keep opening your emails if the content is useful to them. Ask yourself before you send an email - will this be useful to the reader?

## ESTABLISH YOUR GOALS

There's nothing set in stone about how often you should email your clients. But, not enough leaves them to forget about you and too much can be annoying. Be clear on a frequency and make sure you're consistent. Then plan accordingly. It's always good to check dates to ensure they don't clash with holidays or special events that could impact them being read.

# EXPERT INSIGHTS



## Insights from Gayatri Wood, Marketing Manager at The Wow Company

The Wow Company is an accountancy practice that sets out to be at the heart of building beautiful businesses. The heartbeat of Wow has always been about great people working together. Over the years, we've built a team of smart, caring, passionate and fundamentally nice people. A team that loves helping people achieve their dreams and being part of the exciting journey of growing a business.

## SEND EMAILS AUTOMATICALLY WITH BIZINK

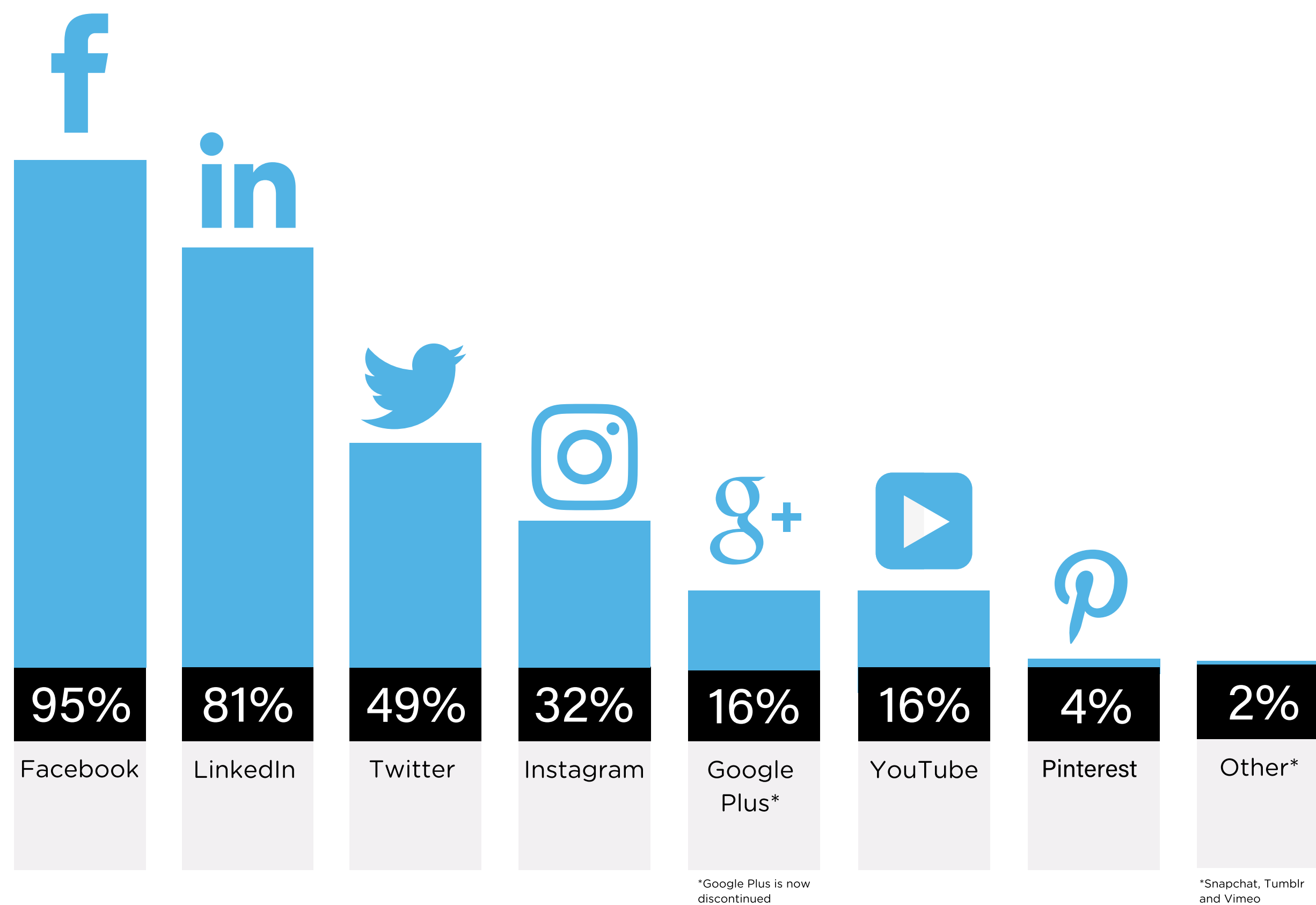
- We'll set up a template for you that is unique to your firm
- Automatically send regular emails to your clients and prospects each month - put together with randomised content from your blog, business resources and technology providers
- Lead magnets with automated emails to grow your email list

06

**Social  
Media**



# WHAT SOCIAL MEDIA PLATFORMS DO YOU USE?



## 28% OF ACCOUNTANTS DON'T USE SOCIAL MEDIA

Social media has been around for over a decade now and now decides elections and occupies most of some people's waking hours.

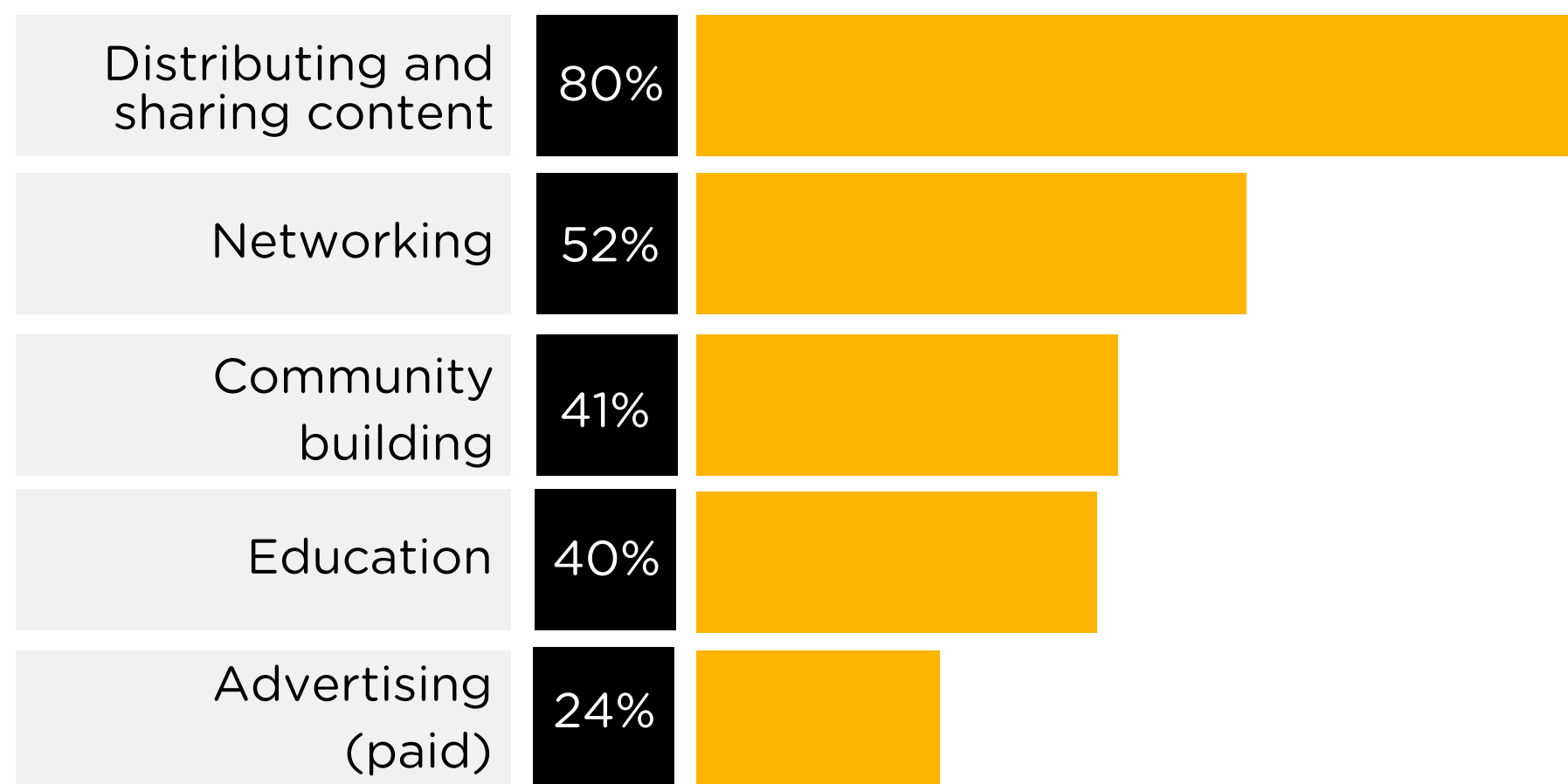
When we started working exclusively with accountants in 2010 almost no firms were using social media for marketing and most were highly sceptical of its value. Now in 2019, 72% are using it, up from 59% five years ago.

At first glance this seems high but it should be 100% - every firm should have at least one social media platform.

72% of firms are now using at least one social platform. This has risen by 13% in five years.



# SOCIAL MEDIA USAGE

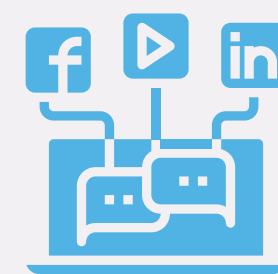


We've seen confusion over how social fits into the marketing mix:

- Is it for advertising?
- Is it for sharing content?
- Is it for networking?

The answer is yes to all of these and it can be used in other ways too. This was reflected in firms using social media in several different ways.

# PERFORMANCE



60%

GET LEADS FROM SOCIAL MEDIA

Judged simply by its ability to generate leads, social media will disappoint many firms. We would view it more as an engagement channel than an acquisition channel. Social is an excellent platform to engage with an existing audience. Look at social as a place to develop your marketing funnel rather than build it.



60%

WORKS BEST



35%

WORKS BEST



6%

WORKS BEST



4%

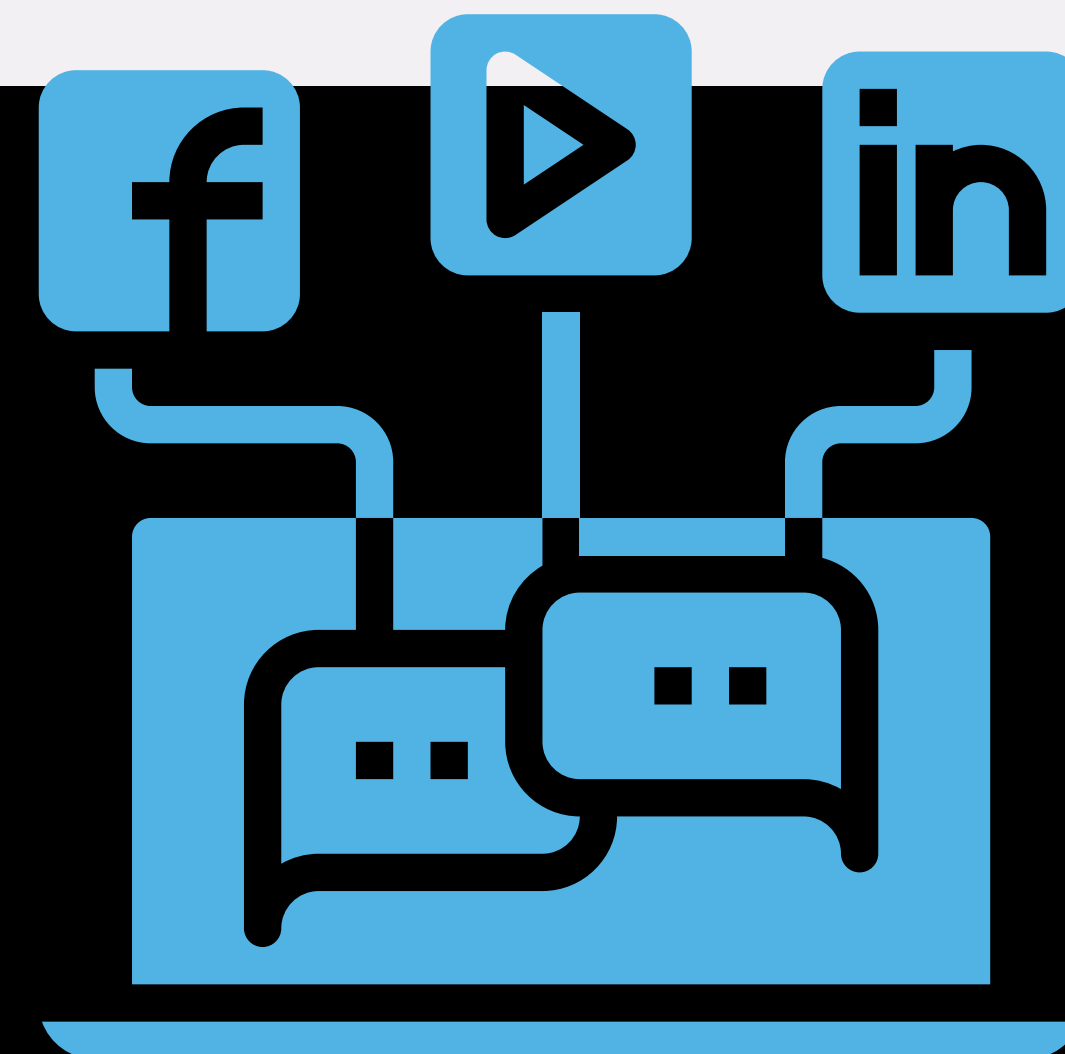
WORKS BEST

The social media platforms that our respondents said worked best for their firm were Facebook and LinkedIn which is as expected given their respective usage. Only 5% of firms felt Twitter was the best platform even though almost half are using it. Time to stop using it?

# HOW TO MAXIMISE SOCIAL

We see many firms thinking they can "sell" on social media simply by pitching their service and firm. People do not want to be blasted with your sales and marketing pitches. Maximise social for your firm by:

- Being on the channels your clients and ideal clients are on
- Treating your community like you value them
- Creating educational content to help them be successful and regularly share this in a consistent fashion
- Being social - engaging with clients and prospects



## GROWING THROUGH LINKEDIN

LinkedIn is one of the fastest-growing social media networks. On average, two people create an account on LinkedIn every second. Additionally, recent LinkedIn research shows more than half of B2B buyers have used LinkedIn to help them make a purchasing decision over the past year.

Mark has used LinkedIn effectively to grow his accountancy practice in two distinct phases. Here are the two approaches he used.

### 2011-13 - THE CONNECT, CONVERSATION AND MEET APPROACH

When I was planning and then started my practice the focus was very much on connecting with business owners who could potentially become clients. In addition, I also connected with individuals who could potentially be a good source of referrals, where we may be able to set up a reciprocal, informal arrangement. So for me this was insurance brokers, financial advisors, mortgage advisers, bank managers. This was a very one dimensional approach.

### 2018 ONWARDS - ENGAGING AND CONVERSING WITH POTENTIAL 'IDEAL' CLIENTS

In 2018 I again focused on LinkedIn, this time the focus was again on connecting with potential 'ideal' clients and then starting conversations, but also producing great content which would appeal to these potential clients. The importance here was:

- Be clear on what ideal clients look like and then connect and start conversations with them - but no selling!
- Produce regular content which demonstrates expertise and how you can help those potential clients -talk about problems and issues - then offer solutions and solve problems. Talking about work you do with existing clients and provide case studies is a great way of demonstrating the value you can provide
- Be consistent, play a long game. People will often watch you from afar for several months before making direct contact. So do not give up after a few weeks or months.

### MORE TIPS FROM MARK

We recently did a webinar with Mark on LinkedIn marketing for accountants where he goes into his tips and experience in more detail. [You can watch it here.](#)

## EXPERT INSIGHTS



### Insights from Mark Telford, Founder of START! Accountants and Founder of Telfords Chartered Accountants

## ABOUT START! ACCOUNTANTS

START! is here to help accountants run the practice they really want. If you're thinking about starting your own practice, or if you're already running your own practice and feel like you need a helping hand to get it back on track, [get in touch](#) and we'll be happy to help.

## ABOUT START! TELFORDS CHARTERED ACCOUNTANTS

Telfords Chartered Accountants provide a comprehensive range of accounting, taxation, finance and business consultancy services. As Accountants we specifically work in the micro and small business sectors where our range of services, business expertise, flexible approach and competitive prices mean that we are able to provide a service and deliver the results that are needed to help businesses achieve their goals.

# 07 **SEO**



# DO YOU GET WEBSITE TRAFFIC FROM SEARCH ENGINES?



**41%** YES

**39%** MAYBE

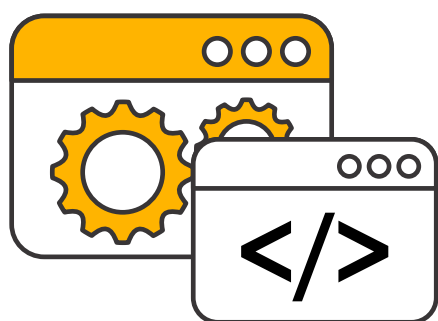
**20%** NO

Coming “top of Google” remains important for many firms. We wanted to know what search engine marketing accountants are doing and the results it’s getting them.

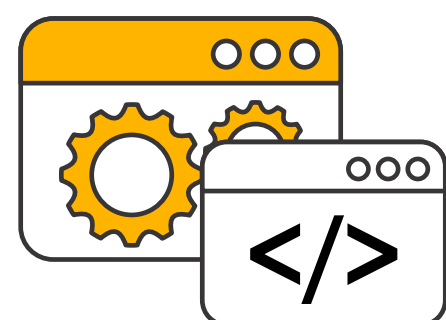
If you don’t know if you’re getting traffic from search engines, sign up for Google Analytics (it’s free) and start tracking.

# SEARCH ENGINE OPTIMIZATION

Search Engine Optimization or SEO is a range of methods used to improve the ranking of a website in search engines like Google.



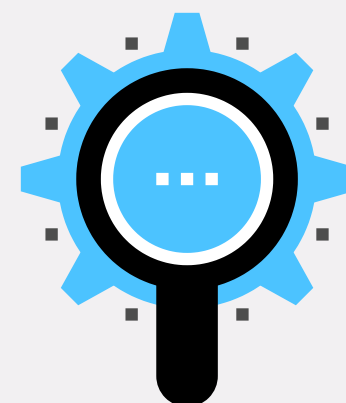
**62%**  
ARE NOT USING SEO



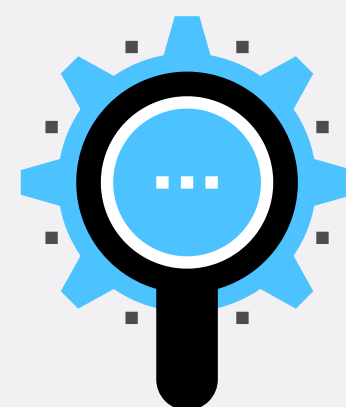
**38%**  
ARE USING SEO

# PAID SEARCH ENGINE MARKETING

Paid search marketing is simply paying to have your adverts appear when people search for certain phrases. The space is dominated by Google AdWords.



**86%**  
NOT USING PAID SEARCH



**14%**  
ARE USING PAID SEARCH

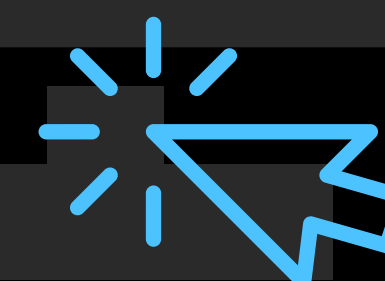
# SEO MYTHS BUSTED

The world of Search Engine Optimisation is clouded by myths, mystery and downright lies.

In this webinar recording Bizink CEO Matt busted some common SEO myths including:

- Does ranking “top of Google” really mean lots of clients?
- Should you register lots of domain names?
- Will Google punish you for duplicate content?

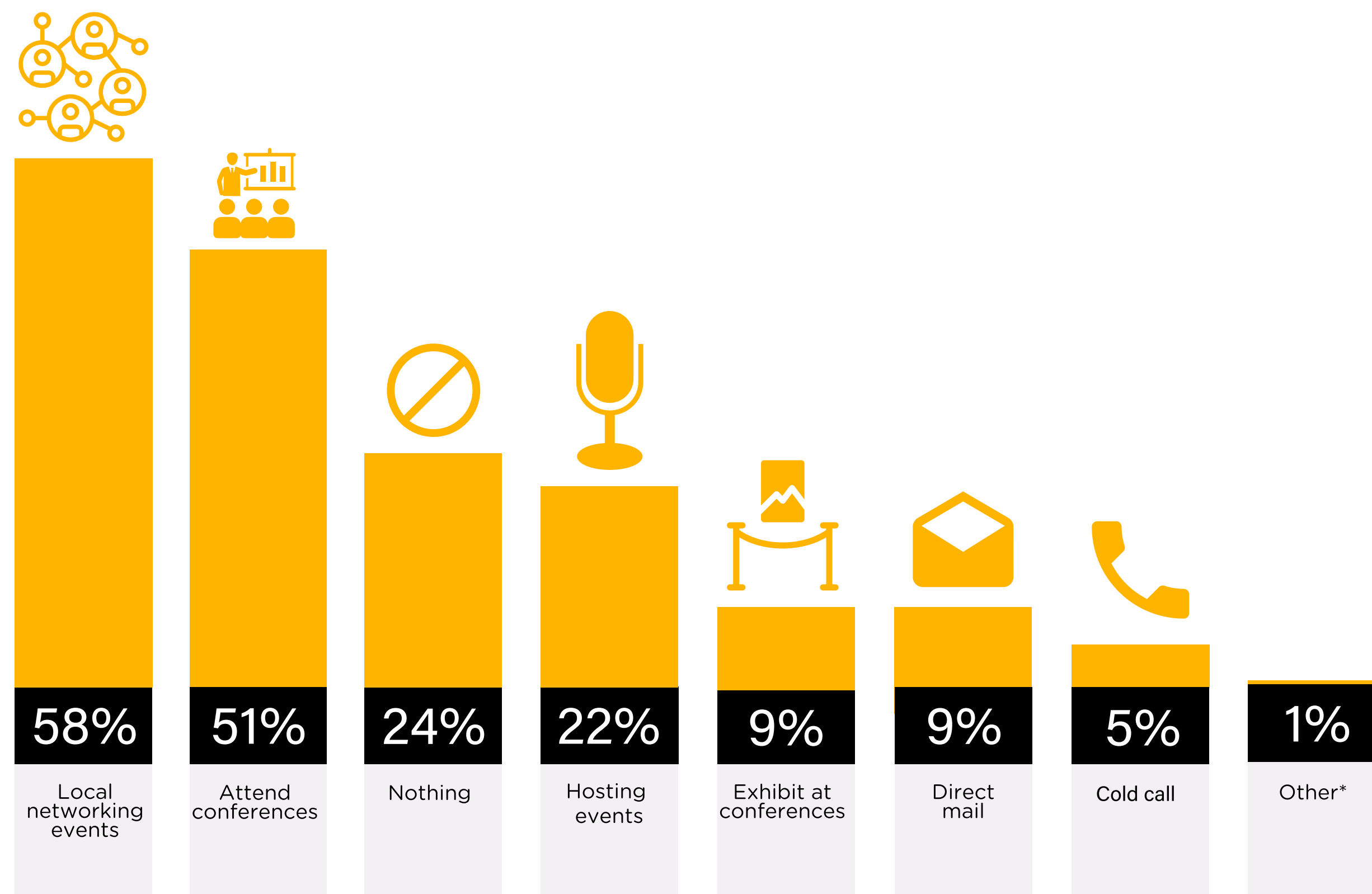
**WATCH THE RECORDING**





# 08 OFFLINE MARKETING

# WHAT OFFLINE MARKETING TACTICS DO YOU USE?



\*Ask for referrals and attend client events

## DON'T OVERLOOK OUTBOUND MARKETING

Outbound tactics like direct mail and cold calling have fallen out of fashion. But modern outbound which uses email, social media and sometimes calls to warm prospects still has its place.

It doesn't get the same coverage as other marketing tactics, perhaps because it's seen as out-of-date, yet most successful B2B companies engage in outbound marketing. When Hubspot, the global leader for inbound marketing software, has a huge outbound marketing team it tells you something!



We'd recommend firms consider outbound marketing as it's an underused tactic in the profession. Our proviso would be only if you're highly targeted to a niche or industry with an offer that truly meets their pain points. If you "target" local small business owners, you can expect poor results.

## USING EVENTS TO GROW

Most accountants we know either love or hate events. Practice Ignition are world renown for their events, especially their #Precon parties. Trent shares his insights into why events are an integral part of their growth strategy and why accountants should use them as well.

### WHY DO EVENTS WORK SO WELL?

Events allow us to get face-time with potential clients, show them through the product and form a relationship. It's much easier to establish a connection, answer any queries they may have and for them to come away understanding how Practice Ignition will help their firm. Solely doing it digitally, we have less control over their experience. They could easily get distracted by a client query and forget to come back to our website, or they could have questions they can't immediately find answers too.

### SHOULD ACCOUNTANTS BE RUNNING EVENTS?

The accountancy profession has a lot of traditional stereotypes attached to it still. Running an event can break down these stereotypes. Events give accountants an excellent platform to break the mould to what an accountant looks like and demonstrate it. Everyone talks about being different. When you start displaying it physically, everyone will start buying into it.

### WHAT'S YOUR ADVICE FOR RUNNING A SUCCESSFUL EVENT?

My top piece of advice would be to have lots of preparation time and a plan to recruit people to attend. This is where I see most people fail. Most people send a couple of emails. They don't call, follow up, or mention it in person. Start at least 12 weeks out from the event date and vary the content inviting people. Things like emails, social media, flyers, including a link on your email signature, videos of speakers if applicable. People respond to and engage with different things.

Along with a plan, I'd advise having someone that takes responsibility for the event and managing the event. Ideally, someone passionate about the event and can keep on top of anyone that needs to contribute to it.

Lastly, my advice would be to be consistent. Measure the success of your event against its objective, ask attendees for feedback and tweak it for next time. When we first launched our #Precon parties they had 200 guests. Now we get over 1400. This comes from consistency and small tweaks to keep improving it.

### HOW DO YOU FOLLOW UP AFTER THE EVENT?

We always measure our events against the objective and we follow up with participants through varied means. Calls, emails, NPS. We always follow up.

## EXPERT INSIGHTS



### Insights from Trent McLaren, Head of Accounting & Partnerships, Practice Ignition

## ABOUT PRACTICE IGNITION

Proposal to paid in one place. Eliminate the friction by sending your clients a single smart proposal they can read, sign and pay in one place. That's more closed deals for you and less back and forth for everyone. 91% of our customers spend less time creating proposals and chasing signatures and payments. [Learn more about Practice Ignition.](#)

Alfa Professional Services  
30 November 2018 - 1 October 2019

<b>1 Summary</b>	
Monthly Recurring	2 x \$150.00
> Professional Services	\$150.00
On Acceptance	\$420.00
> Payroll	\$420.00
<b>2 Payment Details</b>	



# FINAL THOUGHTS

The funny thing about marketing is that everything changes but nothing changes. New tools and tricks launch daily but the underlying fundamentals stay the same. I see a parallel with accountants and marketing - having run this survey several times now, familiar patterns emerge each year.

Specifically: most accountants don't have a marketing plan, they lack the time or skills (or both) to do marketing and they're not getting the results they want.

But it's not all doom and gloom! Since we last ran the survey, a number of indicators have improved: more firms have websites, are on social media and are using marketing software.

Accountants generally get a hard time from marketers so I want to end on a positive note. Marketing is (or should be) one of the best parts of being in business. In your marketing, you get to express who you are, what your firm represents and exercise your creativity. And when you do it well, the end result is dollars and cents.

Remember - business owners want and need your help. Marketing is how you let them know you exist. You're not bugging them - you're serving them.

And there has never been a better time than right now to market your firm. There's access to free marketing education from the likes of Bizink and industry giants like Xero who I created an in-depth marketing planning course for last year.

The internet has extended the reach of firms and reduced the cost to reach prospects. Some firms have built impressive international client bases using just content, social media and communication apps like Zoom.

If there's a downside it's "information overload" when it comes to what marketing. But I'll return to my opening statement "that everything changes but nothing changes" when it comes to marketing. Marketing is simple in my eyes: first, work out what you're selling and who you're selling it too. Then go where those people are and sell it. It's easy to get distracted by "shiny new things" in marketing, but with a focus on your ideal customer and the value you provide them, you'll not go far wrong. Do that with consistency and authenticity and your marketing will sing.

Thanks for reading and all the best for 2020,

**Matt Wilkinson**  
**Founder and CEO**

**IT'S EASY TO GET  
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# HOW BIZINK CAN HELP

Want help with any of the topics raised in the report? We power the websites and marketing of several hundred firms worldwide.



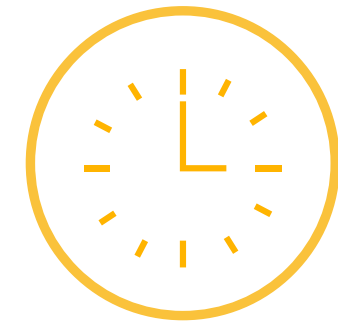
## GENERATE LEADS

Websites and marketing tools that deliver you more of the right type of clients



## ENGAGE CLIENTS

Content your clients will love like blogs, email newsletters and social media posts.



## SAVE TIME

Smart integrations and productivity features that save you time

Ready to take your website or marketing to the next level? [Check out our website](#) or [book some time](#) with one of the Bizink team in your region.

# WHAT OUR CLIENTS SAY



**“WEBSITES CAN BE CONFUSING. BIZINK MADE IT EASY”**

Working with Bizink has been great right from the start. The team were fabulous and spent so much time working through everything with us. Websites can be confusing. It's so easy to get lost and hard to know what to do. Bizink made it easy.

**SANDRA MAGANN, SEACHANGE ACCOUNTING**



**“WE’VE DOUBLED OUR TURNOVER SINCE SWITCHING TO BIZINK 4 YEARS AGO”**

We didn't need to explain what it means to be a Xero Gold Partner and why we wanted that on our website. We've doubled our turnover since switching to Bizink 4 years ago. Our website has been an important part of that growth

**ANDREW MILLINGTON, THE ACCOUNTING HUB**



**“BEFORE BIZINK WE WEREN'T EVEN ON THE FIRST PAGE OF GOOGLE. NOW, WE RANK FIRST.”**

The blogging has been great. Before Bizink we didn't have a site that was ranking SEO wise, we weren't even on the first page of Google for a local search. After a year we ended up in the top three. Now we rank first. Almost all of my local leads are coming through the website.

**TYLER WINN, CIRRUS PAYROLL**

# **Bizink**

WEBSITES AND MARKETING FOR ACCOUNTANTS & BOOKKEEPERS

[WWW.BIZINKONLINE.COM](http://WWW.BIZINKONLINE.COM)