

**SPECIAL REPORT FOR
ACCOUNTANTS ONLY:**

**9 Strategies
& Tools
To Attract
NEW Accounting
Leads & Clients
To Your Firm**

By Jeff Bell

www.MyNewCPA.com



Typical Website or Brochure Text:

When you go with _____, you get more than accountants; you get allies. We help you look beyond the ledger with a high level of involvement that enables our clients to develop the vision that is needed to proactively adapt to a changing environment. And our relentless pursuit of every possible advantage compels us to ferret out the facts and implement the plans, processes, procedures and systems that are needed to accomplish your goals.

Focus On Your CLIENTS Problems, NOT You, Your Firm Credentials or Your Staff. Why? Because...

It is just like meeting someone new at a dinner party or networking event and all they talk about is them, their job, their family, their friends, them, them, them. It's boring but it is NOT the way to START a relationship. Here's the business reality...

Every day there are dozens if not 100's of people, in your city or town, that need their first accountant or a better, more experienced one than what they have. So why don't they call come knocking on your door? It's simple. Competition.

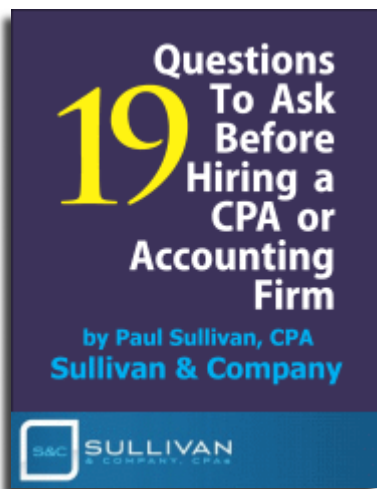
Today unless you're in a rural area, I bet you can stand outside of your office and find competitors within 1 mile of you. And most of "you" all look and sound the same in your advertising. I typically see:

We do accounting, bookkeeping, quickbooks, taxes, consulting, blah, blah blah... is what 95% of all websites say or words to that effect. The consumer just hears WE, WE, WE. We offer... We help... Our staff... Our professionals... My staff... My people...

Frankly in the very beginning of running into you, "we" don't really care about all that. What concerns us is **US** (or ME) and **MY** problems, **MY** issues, **MY** questions about stuff. Think WIIFM is an acronym that stands for **What's In It For Me?**

My 1st Strategy for you to attract new leads and clients is to **change your THINKING, Printed & Online** brochures, materials & websites to talk, ask and discuss THE CLIENT and their Problems, Issues and Concerns. WHY do this? Next page...

Example Cover of a Free Consumer Report:



Do You Use An Appointment Setter To Generate Leads?

If so try **testing using a Free Report** like the one above, instead of asking for an appointment OR as a follow-up to a NO. **You'll capture more names & email addresses** for your Marketing System.

Create and Use the Right BAIT to Attract Your Ideal Business or Individual Client to Your Firm

As I just said whether it's in a networking meeting or online on a Google Search or a website, most CPAs and accountants all **look, sound & act the same**.

When things or people look, sound or act the same, consumers assume they ARE the same and use PRICE as a means to differentiate & decide what or who to hire or buy from.

Unless you want to be known as the "cheapest CPA in town" you want to give other and better reasons for a buyer to hire you. Here's 1 way to be different.

I recommend using a CONSUMER ADVOCATE STRATEGY on your website, when you network or when staff or appointment setters call businesses.

I work with my clients and we create a report, usually titled **19 Questions To Ask Before Hiring a CPA or Accounting Firm**.

If you target audience is a business owner then if they see that you will send them a free report that **helps THEM learn** what to ask and how to decide to choose their 1st or a new CPA, they are much more likely to A) respond to an advertisement like that and B) ultimately choose you when they come to a decision point and take action.

#2 is both a Tool & Strategy. Identify **WHO your Ideal Client** is, what is THEIR biggest question, problem or issue, then **Offer** part of a solution to it in the form of a **Free Report or Checklist**.

It works & is a better relationship starter...


Use a Website Landing Page Without ANY Distractions on it to Capture a Lead For Your Marketing System

Since most people will begin doing some research ONLINE about a person or company, if they see an ad for you, or are even referred to you, they will likely Google you or go to your website just to 'check you out' and make sure you're real.

Most accountants build or pay for an online **brochure or informational** type of website. Especially if you have a template site through CPA Site Solutions, Build Your Firm, Emochilla, CCH, etc., they sell you sites with several if not dozens of pages and navigation links to each on every page.

Example of a Simple NO Distraction Landing Page:

Live Question & Answer HOTLINE Call on Accounting & Bookkeeping in Your Business w/ Paul Sullivan, CPA
This Thursday October 18, 2012 at 10:00 am ET (call ends at 11am ET)
Presented by - Sullivan & Company CPAs



Please REGISTER Here:

*Email
*First Name
*Last Name
* Required Field

Accounting Advice You Can Trust

If your goal is to get a client, know this. People who don't know you from Adam & see an online PPC ad or come directly to your website 'cold', **WILL NOT** see your website and instantly pick up the phone and call for an appointment. Just like they won't walk into the office, credit card or check book in hand and hire you on the spot. It is a **PROCESS** of **PRE-BUILDING a relationship** with the lead.

So a more effective way to BEGIN the PROCESS is to drive traffic from print or magazine ads, radio ads or Google Ads is to send them to a (landing) page on your website with Free Report and ask them to **OPT-IN** (give you their email address & name) in exchange for your Free Report. You want them in your Marketing SYSTEM.

To do that effectively you DO NOT give them 7 other options, pages (potential distractions) to click on and leave your Landing Page. **Take OFF** any web **links** or hide **Nav Bars** so they either opt into your *Marketing System* or not. That's Tool & Strategy #3.

Live Examples of Audio Testimonials Also Transcribed on Landing Pages:

Click below to **PLAY** Audio:



James E. Bollinger,
D.D.S., Inc.
Westlake Village
California



I've had Monica as my accountant for over 15 years. I really like her. I actively refer to her and the reasons are she's a strategic accountant. She can hear the general message beyond the numbers as well as giving you advice. Her staff is courteous. I always get a timely response to questions.



Paul Sullivan CPA



Ed Newton CPA



David Rumsey CPA



Peter Mitchell EA



Monica Rebella CPA



Click on pictures
to see web LIVE
online examples

Using Social PROOF on Your Landing Pages & All Marketing Materials Pre-Builds Trust with Leads & Prospects

If you're growing your practice you have to be aggressively advertising (meaning 'consistently - not hire me or I'll come get you...') to a **target list of potential new clients** aka Prospects.

Online this can be through PPC or Google Adwords ads, your website and specifically Landing Pages designed to get a person who "lands" on it to Opt-In in to your Marketing System (more on this soon).

Or it can be a COLD LIST you buy from InfoUSA or get or scrape off the your Chamber of Commerce site. Radio, TV or print ads will also generate people who watch, see or hear you for the 1st time but still don't KNOW you or if you're nice or trustworthy.

So once they pick up the phone, Google you, or click on an ad (free or paid) where they land or go, you want these places (**landing pages, websites, on hold messages**) to QUICKLY PRE-BUILD TRUST with them so they will take the next step (Opt-In, read further, call for an appointment) in your process.

Having written (good), audio (better) & video (best) testimonials surrounding, bracketing or very visible so they SEE or HEAR or can WATCH other people saying good & great things about you, it gives them a quick sense of who you are and that you're a good person and won't scam or take advantage of them.

With any new client of mine we invest (not spend) a lot of time & effort collecting, soliciting and asking for as many of these in as many formats as possible. So **Strategy & Tool #4** is use as much Social Proof as possible in all your advertising & sales processes.

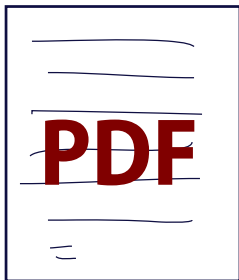
Webforms Are Used to OPT-IN or Give Permission to Email People:

Email

First Name

Last Name

**AutoResponder
sends out your
information:
PDF or Audio
or Video**



Using Online Webforms to Opt-In People and Email AutoResponders to Deliver Your Information To Them

Before the Internet savvy marketers would advertise to people to see who would “raise their hands” in response to the advertisement. When someone responded then you would **manually send out a piece of mail or a postcard** as part of a follow-up system, in order to further engage them and move them through the buying process.

With the Internet and e-mail, plus the increasing cost of using the US mail service, it makes economic sense to use electronic means to follow up with leads.

This is why on the Internet you will see **Web forms** where people fill out their e-mail address first and last name, sometimes additional contact information, in order to gain access or download some type of report or other electronic information.

This web form automatically opts that person into a marketing system for future advertisements, efforts, a follow-ups such as an e-mail newsletter. The automatic part of this is called an **autoresponder**, which not only delivers the initial free report but can also send a **series of e-mails** after that initial report, spaced days weeks or months apart, all done automatically without your having to touch it.

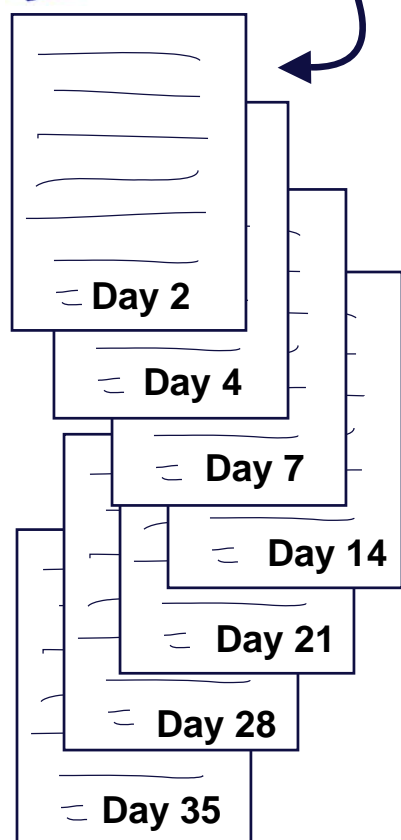
Auto responders once set up properly, can save administrative time and money and do an outstanding job of delivering on time on a set schedule follow-up information to your leads, prospects, potential new customers clients and patients.

It takes significant planning, time and effort to set up AutoResponders correctly but **Tool #5** can set you apart from your competition when following up with leads or prospects in your Marketing System.

After the Report Goes Out on Day "0" the AutoResponder Starts Sending Your SERIES of FOLLOW-UP Emails:



Day 0



Use Email AutoResponders to Create a Follow-Up Sequence of Emails That Build a Case To Buy From You

Because business people and consumers are typically busy with other things in their lives, it is typical for them to forget once they've downloaded your information to read it, follow-through, and take action like we want them to.

Therefore we always **follow-up with them** for a period of time after they downloaded your information, to make sure they have multiple opportunities to read it, listen to it, or watch it.

AutoResponders help us do this because we can set them up to send out a series of e-mails, spaced apart by days weeks or even months, automatically so that we don't have to touch or involve ourselves in the sending of these e-mails every time someone responds to our marketing or advertisements.

Granted it takes time for us to preplan what we want to say, what we want each e-mail in the series to emphasize or resell or explain. Once done the system takes over and frees up our time as owners to do more productive tasks and projects (*call or meet with people pre-interested in your services*).

Because time and repetition build trust, all responders are unique in that we can use them to follow-up and restate our case, explain the advantages of our products and services, and pre-build a relationship with the lead or the prospect.

Then as they become dissatisfied with their current provider or something in our follow-up series strikes a chord with them, we already have a level of trust because of the information we've given them in the follow-up we maintained with them. This Tool #6 helps set us apart from the competition and gives people **a reason to reciprocate** when they do decide to buy the products or services that we sell, by choosing us over our competition.

Send out a Monthly eNewsletter on a Tax, Accounting or Bookkeeping Topic That Educates:

Once Your Email AutoResponder Series Ends You Should Be Sending a Monthly eNewsletter to Continue...

...the conversation that **you already started** with your prospective client, through the e-mail autoresponder and the autoresponder follow-up series.

The topic or the article of your newsletter doesn't have to be sophisticated or in-depth. In fact **you stand a better chance** of having leads and prospects as well as clients read your newsletters if they are relatively short.



So often website companies will have a standard newsletter that people can receive via the template or brochure website that they create for accountants and CPAs.

Financial Services by Sullivan & Company introduces:



Kathy Grow EA/IAAR

For over 20 years, Kathy has worked in public accounting. She is an enrolled agent (EA) through the Internal Revenue Service. She specializes in small business accounting, along with business, individual, trust and estate taxation. She has represented clients in IRS audits and in collections. She has performed CFO services for a not for profit and is proficient with non-profit IRS reporting (Form 990).

In 1996 Kathy broadened her interests to financial planning. She has assisted many small business owners set up retirement plans and consults with individuals to aide in their financial decisions. She currently is a representative of Archer Investment Corporation, a Registered Investment Advisor (RIA) firm.

Kathy is a member of the National Association

Tax Implications of the Affordable Health Care Act

The July 2012 Supreme Court ruling upholding what's collectively referred to as the "Affordable Care Act" (ACA) or "Health Care Act" has resulted in a number of changes to the US tax code.

As such there are a number of tax implications for **individuals and businesses**. With that in mind, let's take a closer look at what it might mean for you.

Individuals

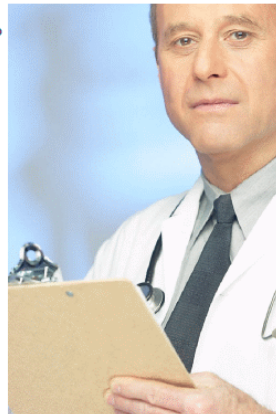
Individual Mandate

Starting in 2014, US citizens and legal residents not qualified for Medicare or Medicaid must obtain minimum essential health care coverage for themselves and their dependents or pay a tax penalty that varies based on income level.

In 2014, the basic penalty for an individual (no dependents) is \$95, with substantial increases in subsequent years--\$325 in 2015 and \$695 in 2016, indexed for inflation thereafter.

Refundable Tax Credit

Effective in 2014, certain taxpayers will be able to use a refundable tax credit to offset the cost of health insurance premiums so that their insurance premium payments do not exceed a specific percentage of their income. Qualified individuals are those with incomes between 133 percent and 400 percent of the federal poverty level. A sliding scale based on family size will be used to determine the amount of the credit. In addition, married taxpayers



They will list **6 to 10 articles** that a person can choose from. My personal experience is having to choose from that many articles in another itself is a hurdle to people reading a newsletter. I & busy people just don't want to have to deal with 'choosing' and I often just skip reading any of them.

Better especially for busy people, to just pick one article that you feel is significant and highlight that issue.

E-mail services like **iContact**, Constant Contact, InfusionSoft, offer templates that you can reuse to jumpstart the process.

The goal of **Tool & Strategy #7** is to maintain contact with your lead or prospect, and through consistent follow-up. You will continue to build trust through your articles and a relationship with that person so that when they do become unsatisfied with their current accountant you **will be on their short list** of people to contact to replace them.

Start Hosting Monthly or Quarterly TeleSeminars & Webinars To Build Credibility & Leverage Your Time

Send out a Monthly eNewsletter on a Tax, Accounting or Bookkeeping Topic That Educates:

People that people that speak in front of large crowds have a distinct advantage over those that don't. Speakers are ascribed credibility & knowledgeability on their topic and are often thought of as an expert in the area they speak on.

Tele-seminars and webinars are the next best thing to public speaking as you are thought of as a "speaker" and you can communicate your message to large groups of people at once. And unlike physical speaking engagements the attendees (or you) do not have to leave their office or home in order to hear your message.

CONFERENCE MODE — active conference only

- ☐ **INTERACTIVE** - All guests can talk (guests press *6 to mute)
- ☒ **LECTURE** - All guests are muted (guests press *2 to raise hand)
- ☐ **Q&A** - All guests are muted (guests press *7 to talk)
- ☐ **PARTY** - All guests can talk; no host required

Hold all Guests

Drop All

Lower Hands

Conference unlock

12 Callers

Refresh

Legacy Refresh Mode

Disable Dynamic Updates

Hide Muted Guests

Last page reload 00:03:55 ago

Type	Caller	Name	City, ST	Hand	Mute	Volume	Duration	Hold
Host	9496614966	Rebella, Edward	Capistrano Valley, CA			- Auto +	20m	Hold
Host	3177741777	Bell, Jeff	Noblesville, IN			- Auto +	28m	Hold
Guest	8056670566	Longwell Dennis	Ventura Central, CA			- Auto +	0m	Hold
Guest	9496974969	Guchet David	Irvine, CA			- Auto +	1m	Hold
Guest	9494994949	Burchett Bonnie	Laguna Beach, CA			- Auto +	3m	Hold
Guest	2022390223		Washington, DC			- Auto +	13m	Hold
Guest	9099450994	Tanes Peter	Upland, CA			- Auto +	14m	Hold
Guest	5629916299	Wasper Paulette	Norwalk, CA			- Auto +	17m	Hold
Guest	9095180951	Cell Phone, Ca	Ontario, CA			- Auto +	17m	Hold
Guest	3103221032	El Segundo Dent	El Segundo, CA			- Auto +	20m	Hold
Guest	9519075190	Cell Phone CA	Riverside, CA			- Auto +	20m	Hold
Webcast	<Recorder>	630043				- Auto +	30m	Hold

Structured properly with good information first, a question-and-answer session 2nd, followed by an Offer and a CTA or Call To Action, tele-seminars and webinars can be used as a lead generation tool as well as a platform to close & convert leads who may have heard of you already, but just need an invitation and a reason to take the **next step** in the buying process to hire you.

Strategy and Tool #8 is to begin hosting at least a quarterly tele-seminar (where you only use the phone to dial in) or webinar (where you screen share information to the attendees) to create & build your Expert status.

Here's How I Use YOUTUBE To Generate More Leads & Sales:



I use YouTube when ever I have a Video of a Webinar or an AUDIO recording of a Sales or Advertising oriented Tele-Seminar that I want people to listen to as a **REPLAY** so they will take action on the **OFFER** we make on the call. I use the audio to create a VIDEO replay that I can then post on my clients YouTube Channel and embed on their website for playback. And finally we take the same videos and post them on Facebook FAN pages and LinkedIn profiles, again to build a relationship and create an "expert" positioning with leads and clients.

When & How To Use Social Media (Facebook, LinkedIn, YouTube) With Prospects, Leads & Clients

Social media, like any other media, should always be looked at as a means to communicate an advertisement, sales or service type of message. Whether it's print media, radio or TV media, you're always looking at the **level of response** you get in exchange for how much **money you spend**.

Facebook as a social media Tool can be used in 2 general ways. The **free** way is to generate Likes for a personal or fan page and then post updates that can be educational or sales in nature. The thinking is if your potential clients are playing around on Facebook they will see your posts and respond.

But just like print media where the article is the content, or radio and TV media where the programming is the content, the advertisement still needs to interrupt & grab the attention of the reader or the watcher or the listener, and move them toward some type of response in the advertising or the sales process. Otherwise whatever you're doing, writing, posting is purely SOCIAL & has no BUSINESS VALUE (aka "waste of time + \$\$").

Think of people on Facebook as being in a coffee shop talking with their friends and family, and you're trying to grab their attention for some business reason. *It may be more difficult than you think.* The **paid** version of this is to **pay for ads** that appear on the right side of Facebook. But your task as a marketers is still to grab the attention of the person on Facebook and get them to click on your ad.

It's possible to get results using this strategy but I have found that Facebook is a *more effective tool to communicate to existing clients or customers that already know who you are or already buy from you, then it is to try and generate leads out of the cold.* There are exceptions to this using more advanced advertising techniques that are too complicated to explain here.

LinkedIn is a good tool to **grow your network** and **generate social proof** in the form of Recommendations and Endorsements. You should also participate in and start Discussions and use the Promotions tool in LinkedIn to create interactive posts and get exposure to people within your network.

My suggestion is to 1st use Social Media, **Tool # 9**, in a combined Network Building and Social Proof strategy. Solicit as many Likes to Facebook Fan pages and Connects to your LinkedIn Profile. Then use your Monthly eNewsletter to post on your Fan page and LinkedIn account to communicate information and updates to your leads & clients.

For All The Strategies & Tools To Work Effectively You Need To Put Them All Together in a Marketing SYSTEM

If you have the discipline to get this far I want to tell you the most important aspect of all the strategies & tools so that they will work effectively together. You need to combine them into what's called a **marketing system**.

As business owners we tend to waste a lot of time with halfhearted attempts to do marketing, specifically advertising and follow-up selling, that because of other time constraints and distractions in the business, we loose focus and our **efforts under perform and don't make us money**.

The way to overcome this is to set aside big chunks of time to think through and plan out a marketing system that automates as much of the process as possible. Once you've designed your marketing system then you need more big chunks of time to actually install it, and then implement it inside your

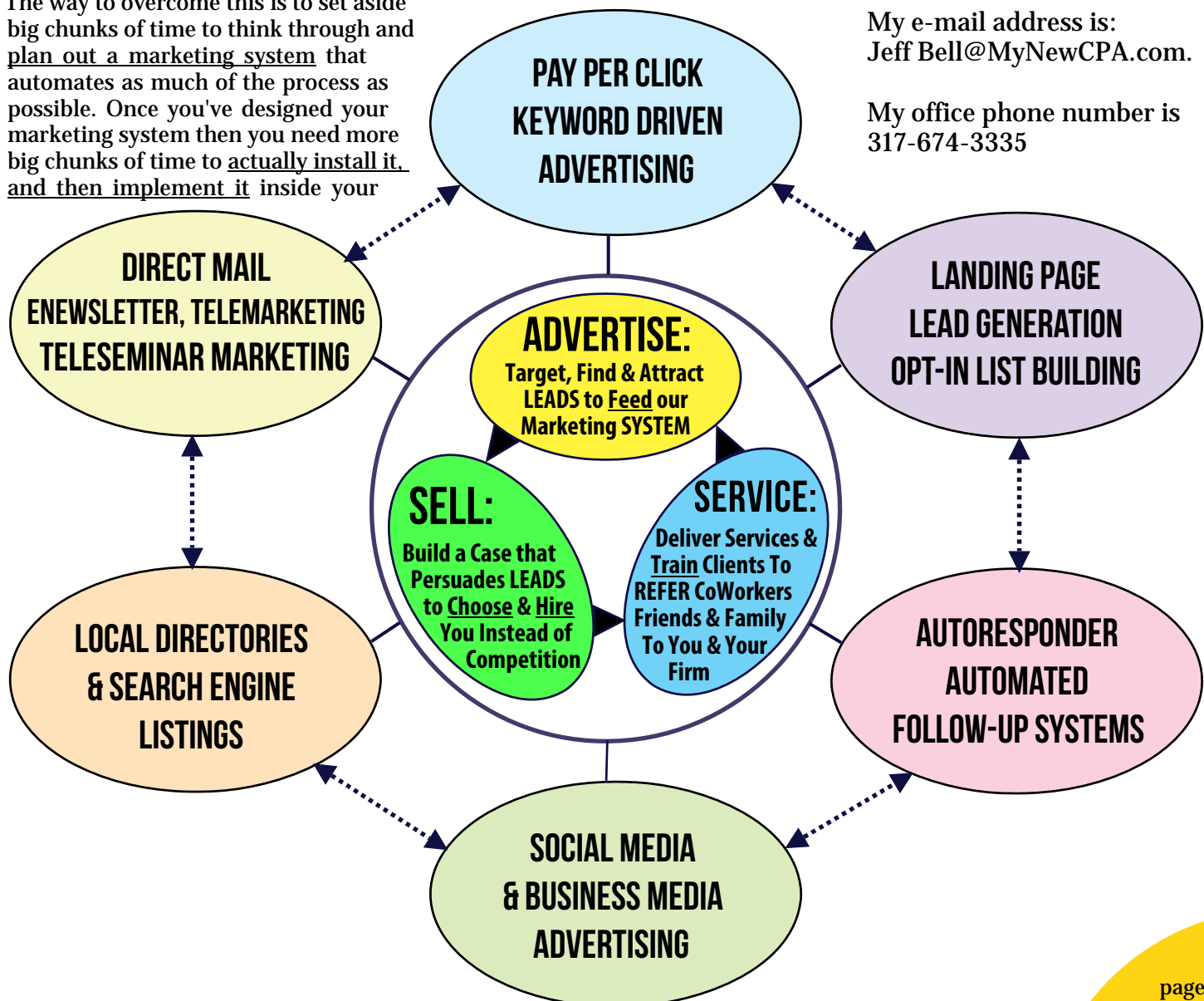
practice so that it works on a continuous basis day after day week after week month after month.

One strategy to accomplish this is to **outsource the entire project to marketing system expert** that has done this before with success, and pay them to do it for you while you focus on the day-to-day aspects of running your practice.

I and my company do this type of work for accountants and CPAs across the country and if you are interested in learning more about how we might help you do the same, feel free to send me an e-mail or give me a call.

My e-mail address is:
Jeff Bell@MyNewCPA.com.

My office phone number is
317-674-3335



Audio Testimonials (Transcribed) from www.MyNewCPA.com on Jeff Bell & Sales and Marketing Results



Hi this is Troy Patton, CPA and in addition to my accounting practice I run a commercial finance company, a business valuation company, several coaching groups for other accountants and I manage a mutual fund called the Archer Balance Fund, symbol ARCHX.

In 2006 Jeff started working with me on marketing my different businesses and generating leads for them through programs like Google Adwords, building web sites with functional landing pages and special reports to convert the leads into clients for my businesses. With Jeff's help I've used tools like marketing databases, email newsletters, teleseminars and direct mail to create information products that I also sell online. If you're an entrepreneur like me and you're looking for someone to help you grow your business, I'd really recommend talking with Jeff about the different ways he can help you build systems to grow your company.

Troy Patton, CPA - President | Archer Investment Corporation | Indianapolis, IN | www.CoachPatton.com



This is Dr. Jacque Russo of EnviroMed Design Group. We are an international architecture & interior design and build company for high end medical and dental offices. We've been working with Jeff Bell for the past year and a half on our marketing to develop leads for our office design company. The things he has done for us include

internet and Google pay-per-click advertising, specialty newsletters, websites and landing pages for lead generation. We've done national teleseminars and behind the scenes back-end systems and tools that keep us in communication with our clients. We've been so pleased with Jeff's knowledge and professionalism that we highly recommend Jeff Bell. He's frugal with our marketing dollars and always delivers on time. He's just a 10 and we're so proud to give this testimonial for him.

Dr. Jacque Russo, Director of Marketing | EnviroMed Design Group | Boca Raton, FL | www.EnviroMedGroup.com



This is David Catalano and I just wanted to get on your testimonial hotline and tell you what I think of you and your work and how much I appreciate everything you've done. Feel free to give this information to anybody that wants it. Jeff's worked with me for probably 4 years now and he's really helped me quite a bit in my business. We were able

to migrate all my sales team over to a relational database management system which allowed us to track our sales and our marketing effectiveness. It allowed us to build our marketing systems including Adwords, websites and autoresponders and bulk emailers. We're actually doing teleseminars now where we actually have clients sign up and come listen to us and we don't have to visit with people to spread our word. He's also helped us track the responses from our direct mail and our email marketing and our internet marketing. He's driven our response rates up and our cost per leads down and that's been good. He's been really good to work with and very responsive.

David Catalano, CEO | Midwest Bankers Group, Inc. | Indianapolis, IN | www.MidwestBankers.com



Hi this is Mike Hale, I'm President of Advanced Radiant Systems in the Indianapolis area. We manufacture Cool-Space portable evaporative coolers and manufacture and distribute Ambi-Rad gas-fired radiant heating systems. Our business takes us all over the country with one product and all over the world with another. We acquired Jeff Bell's assistance to assist us with advertising and marketing our products. He implemented different processes going to market. One was a card deck mailing that we found quite successful. We developed with his assistance mailing lists in different markets. We cover automotive, aviation, manufacturing are the markets we tend to get into. And he helped us in setting up some of the dealers and distributors that we have and different programs working with them. If you're a small business owner and looking for someone to help you grow, I feel like Jeff was a small enough company as I talked to a lot of larger companies where their cost and the kind of money they expected you to spend kind of scared me. I was real fortunate to find Jeff and would recommend Jeff to anybody. His morals and his ethics are quite desirable. His knowledge of marketing is very well too. He's helped us on website design, Adwords do develop leads from our website. We've been a corporation for about 30 years now and Jeff has been the best thing for us about marketing.

Mike Hale, President | Advanced Radiant Systems, Inc. | Fishers, IN | www.Cool-Space.com



This is Tony Patrick from Finance Geeks and I wanted to make a couple comments regarding Jeff Bell. Finance Geeks and I have benefited from his experience and expertise for the last 5 years. And what's proven to be so invaluable is Jeff's creativity. He can take a simple idea and create incredible and multifunctional marketing pieces. In addition Jeff's knowledge of emarketing solutions and search engine positioning is unmatched as far as I'm concerned. Ultimately Finance Geeks success is very much the result of Jeff's hard work and creativity. I would strongly recommend hiring Jeff Bell and his marketing company. I'm that with him your company's potential can be reached.

Tony Patrick, MBA | Finance Geeks | Indianapolis, IN | www.FinanceGeeks.com