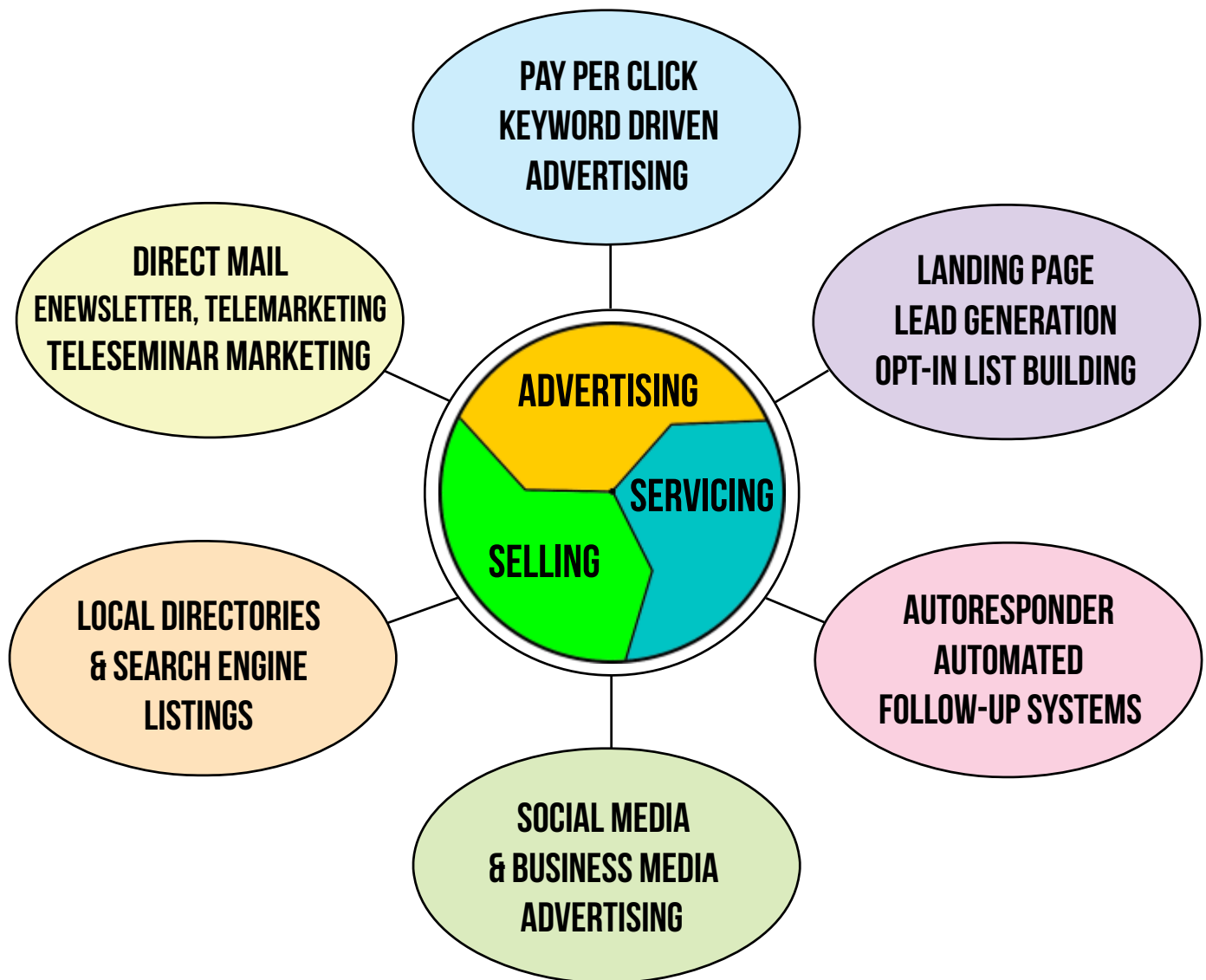


*For Accountants and CPAs who want to grow their practices.*

JEFF BELL & SALES AND MARKETING RESULTS PRESENTS

# MARKETING SYSTEM CREATION & MANAGEMENT FOR ACCOUNTANTS & CPAs



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# Marketing System Creation & Management Program

By Jeff Bell - Sales and Marketing Results

## Executive Overview of MSCM Program

To grow your accounting practice the **creation, implementation and ongoing active management** of marketing systems is the foundation for growth. Accountants can outsource this need to our company so they can concentrate on day-to-day operations & servicing clients while we build their marketing program.

We use a **Direct Response, Lead Generation**, advertising Strategy to fill your sales funnel with potential new client leads. The critical pieces of this process are Systems to 1) identify & attract potential clients, 2) then build a case for hiring the accounting firm so 3) in a sales setting the prospect is persuaded to become a paying client.

For most local accounting practice marketing activities and efforts to be effective, the activities must:

1. Use proven marketing **Principles** with,
2. **Strategies** that maximize the response to the advertisements,
3. Incorporating **Tools** that work the best for,
4. The right **Media** so ads that are run will reach,
5. The **Market** (people) we want to see the ad with the
6. Right **Message** that grabs their attention, with all of the above,
7. Combined into a **System** that generates leads and helps convert the leads into paying Clients.

### PHASE 1: Marketing Foundation Assessment starts with:

- The **inventory & analysis** of your current **marketing activities** and your **growth goals** for your firm.
- The evaluation of your **physical and online** marketing presences in your local market.
- The establishment of **additional** physical and online marketing presences in your city.
- The creation of **social proof** (testimonials, recommendations, reviews) for advertising & selling.
- **Ideal client(s) identification** (your Market) and targeting for future advertising efforts.

### PHASE 2: Marketing Strategies, Systems & Tools continues with:

- Introduction of **online platforms & sites** in locations where client leads can be found.
- Creation of online lead generation **landing pages & autoresponder** follow-up tools & systems.
- Identification and testing of **lead generation advertising** as the entry point into your marketing system.
- Establishment of online **pay-per-click** advertising campaigns based on keyword search terms.
- Scheduling of a rolling **12-month marketing calendar** that may include but is not limited to:
  - Implementation of monthly emailed *newsletter* to client targets/niches,
  - Recurring *teleseminars or webinars* on accounting/tax/investment topics,
  - Targeted *direct mail campaigns* to leads, house lists and potential client niches.

### PHASE 3: Ongoing Advertising, Selling & Servicing Management:

- Phase 3 is the ongoing management of Phase 1 & 2 assets and related activities including:
- **Preparation, hosting and post event** content creation & distribution of teleseminar & webinar events.
- Newsletter content creation/curation for **monthly distribution** to lead & client lists.
- Social Media content creation/curation **distribution** to lead & client lists (YouTube, Facebook, LinkedIn)
- Monthly **tracking & reporting** on online response, opens, clicks & opt-in activities.
- Recurring planning & implementation **phone calls** with you on marketing activities & results.

The Marketing System Creation & Management program begins with you paying a **1-time setup fee** and then on ongoing **monthly management fee**. *Additional monthly fees for testimonial phone lines (AudioGenerator), email newsletter services (iContact), pay per click advertising costs (Google Adwords) and other as needed direct mail, USPS postage, postcard, envelopes, transcription, telemarketing, telecommunication, web site hosting & development, URL/domain and related marketing costs are paid by you as required by current marketing campaigns and activities.*

For a more **detailed explanation** of the program you can continue reading. For **program pricing** you can go to the last page 12, on this document titled Order Form. If you have questions or comments please contact me by calling **(317) 674-3335** or email me at **jeffbell@mynewcpa.com** Jeff Bell

# Marketing System Creation & Management

*By Jeff Bell - Sales and Marketing Results*

## Background of Working With Accountants & CPAs

After 19 years of running large \$50+ million divisions I started a marketing consulting business in 2001. For several years I helped sales trainers, manufacturers, distributors, finance companies and other small businesses grow their sales by creating and managing structured marketing programs.

In 2006 I met Troy Patton CPA through a client of mine. Troy had recently sold his CPA practice for \$6+ million to Fiducial and because of his non-compete could not start or operate another accounting firm. He had also just started a mutual fund, the Archer Balanced Fund, and was looking to bring assets into the fund and wanted “marketing” help.

I asked Troy about his \$6 million accounting practice, how he got started and built it from literally nothing. His story gave me an idea and my suggestion was that other CPAs would be willing to pay to learn how to build and grow their own accounting practice like he did. The business idea was to start a coaching program for other accountants, teach them the strategies & systems he used to grow his practice.

Troy’s dad had coached Troy as a wrestler in his younger days and so “Coach” Patton was started where CPAs could learn how Troy grew his practice and do the same for theirs. It was a win-win especially while Troy’s non-compete prohibited him from starting or owning his own CPA firm. He could teach others what he knew and be paid for that knowledge. So we started to create marketing systems that would attract accountants via advertising, into a sales funnel. Because Troy could work with any accountant in the country, we started a Google Adwords campaign using a lead generation strategy (Free Special Reports) to create a lead list.

We advertised to these leads on a consistent monthly basis and created related low-end training programs they could buy from Troy. Then we primarily used live teleseminars to tell Troy’s story of practice growth to \$6 million and how they could be coached to do the same. On the first teleseminar of over 100 attendees 15 people expressed interest and 9 ultimately signed up for his coaching program.

The marketing Systems, Tools and Strategies I had used with my other clients prior to Troy were easily applied to his business situation. And over time Troy’s coaching clients, having seen how his systems worked to attract “them” to Troy and his program, wanted to do the same with their accounting practices. Since then I’ve worked with accountants and CPAs nationwide to help them grow their practices.

If you are a Troy Patton / Coach Patton client then my marketing Systems, Tools and Strategies will enhance and compliment what Troy teaches. The challenge accountants and most small business owners face in marketing & growing their practice is to A) create Tools that find leads & prospects for their business, B) create Systems that nurture or build a case that persuades prospects to contact and hire the accountant and C) implement ongoing Strategies that retain clients, prompt repeat business and encourage them to refer other clients to the practice.

My Marketing System Creation & Management program does all the above. We create all the Tools, Systems and Strategies, manage them constantly as well as customize and add to them based on the needs of the accountant and their growth goals.

On the following pages I have outlined the Start Up and Monthly Management activities we do for clients who hire us for our Marketing System Creation & Management Program. After reading it if you have any questions you’re welcome to call our offices at 317-643-JEFF or 317-643-5333.

Jeff Bell - The Marketing Doctor

## Why Accountants Need Marketing Systems To Grow Their Practices.

In business most small business owners, accountants included, are good at doing what they are trained to do or skilled at.

The restaurant owner is good at cooking food. The CPA is good at taxes & accounting. The dentist is good at clinical dentistry and so on.

But regardless of their skills inside the business the same business owners do not inherently know how to market their business.

By market their business I mean advertise to people who don't know them, then sell people on their products or services. And finally service their clients in such a way to retain them and have those clients refer business to them.

The marketing activities (**Advertising, Selling, Servicing**) should be an ongoing, integrated process that drives the addition of new clients, associated increased revenues and profits for your business.

Of the 3 elements of marketing I just mentioned, **Advertising** for accountants which is *finding and attracting qualified, well-paying, potential clients in sufficient numbers on an ongoing basis*, is probably the most challenging of the three.

For Advertising to be successful it needs these **7 elements to work together**, which are to:

**1** Use advertising **Principles** that are effective in getting people to respond to the ads,

**2** Use a **Strategy** or approach that increases the percentage of people who respond to the ads,

**3** Use advertising **Tools** correctly so each advertisement gets the best results it can,

**4** Target the right **Market** (people or companies) the accountant wants to attract & work with,

**5** Use the right **Message** that grabs the attention of the people seeing/hearing the ad so they can respond to the ad and,

**6** Use the right **Media** so ads that are run will reach the people (Market) we want to see the ad and finally,

**7** Combine all these into a **System** or sequential, ongoing process that works continuously to generate leads and help convert them into paying Clients.



Each one of these 7 elements is an important as the other. But the concept of combining them all as an **ongoing process** or **System** is what will give the business stability over time.

Stability in the form of potential clients (leads or prospects) either contacting you & your practice to become clients OR you contacting potential clients and a percentage of them becoming your clients.

It starts with creating and replenishing a fresh pool of new leads or prospects that you can talk with, meet with and sell on the advantages and benefits of becoming your client.

And with average or better sales skills you can convert or close these leads to create a flow of



new clients on a regular basis, which is the engine that grows the practice.

## It Is Hard To Get In Shape With Just One Trip To The Gym

**Growing a business or accounting practice can be compared to getting in shape and I'll use some analogies in explaining why.**

If you're overweight, unhealthy and out of shape you might make a trip to the local gym or fitness center and go through a grueling 1 hour workout.

After the workout, a day or 2 later, if you said to someone, "*Hey I had a great workout at the gym the other day but I can't understand why I'm still kind of fat and not in shape yet*", they would probably chuckle and tell you one trip to the gym won't get you back into shape.

It doesn't take fitness trainer or expert to know that you'll need to go **multiple times** to the gym to just begin to see results.

In fact you'll hear that you probably need to come up with a routine or workout schedule if you really want to see results. If this sounds familiar or makes sense, you will find Marketing is similar.

I've met and talked to hundreds of business owners who will run **1 ad** in a magazine or paper, receive few or no calls or leads and say "it (advertising) doesn't work". Or send out **1 piece** of direct mail (letter or postcard) to a list, get little or no response and again say, "it" or direct mail doesn't work.

Or they'll hear that using Facebook or LinkedIn will help find clients so they'll put up a page, post updates for couple days or weeks, stop and not understand why no one came bounding through their door with checkbook in hand ready to sign up for accounting services.

Chances are that they used the wrong strategy on the print/magazine/newspaper ad but they also made the assumption that **doing something once or for a short period of time** will yield fantastic results.

A good example is using a **monthly Newsletter** to communicate with lead/prospects as well as your current clients.

Part of our system is to collect the email & physical addresses of people who might be interested in changing accountants or hiring one, and sending them an emailed newsletter each month.

In the newsletter we cover a **business subject they are interested in**. They are also given opportunities to download reports and guides as well as invitations to teleseminars and webinars on business, accounting, tax & investment topics.

The goal and effect of these consistent activities is the building of trust in the person's mind that you are a good, reliable person or business they can & should hire **if & when** they need your services.

Although you cannot control the "if & when" part of when a person or business needs their first or new accountant, you can heavily influence **WHO** they look to and ultimately decide to **CHOOSE** when that time comes.

Many accountants regularly share with me that they will receive calls from and have meetings with business owners who say, "*I've been receiving your information for month/years and feel like I know you better than my own/old accountant...*".

Needless to say these types of calls & sales meetings, *where a relationship has been pre-built*, result in **more** (higher percentage) people hiring the accountant and doing so *without discussion or negotiation* of prices or fee levels.

## The Secret STRATEGY To Getting Results (Finding Leads and Converting Them To Clients ) in Marketing Your Accounting Practice

The most common mistake accountants make (again like most business owners) when starting to advertise their practice is taking the simple “me too” branding approach to advertising they see their peers doing, in order to find clients.

Branding or image advertising, which is what you see from national brands on TV and hear on radio, doesn't typically work for small local businesses and requires ad budgets most accountants just don't have.

Let's say you live in a city or local area of 50,000 people with 5,000 businesses. When you use a **BRANDING Strategy** you take this approach, *“I want to have my advertising message in front of all these 50,000 people or 5,000 businesses all the time so when they want an accountant or CPA, they'll hear/see my TV/radio commercial and pick up the phone and call me.”*

This means TV & radio ads that sound like this, *“Smith & Jones CPAs are your solution for all your bookkeeping and accounting needs. In business since 1959 and family owned, we're the largest accounting firm in the tri-state area. For more information call us at (phone number).”*

And these ads are run **weekly if not daily** on local TV & radio stations, day and night so when the business owner one day, who's been thinking about changing accounting firms for over a year, decides they've had enough and need to make a change, they hear “the ad” remember the phone number long enough to grab their phone and make a phone call.

Now this DOES work but the problem is that the amount of money you will need to spend to run ads like this is probably 5 to 10 times your total annual revenue. If you bill \$200k/year you could spend \$1-2 million in advertising to get all this done and it will put you out of business.

The alternative Strategy (**Direct Response - Lead Generation**) is to periodically go to the 50,000 people or 5,000 businesses with a direct response, lead generation **Offer** that gets people who might be interested in an accountant now or in the future, to “raise their hand” so we can narrow down and target ONLY the people who might actually WANT our services, and market to them.

Better yet, before we advertise, we can look at the 50,000 people or 5,000 businesses and say we only want Clients with household incomes over \$75,000 per year and businesses with revenues between \$500,000 and \$2 million.

Then with those demographics and possibly lists (phone, address, email) that whittle our market down to 5,000 people and 1,000 businesses, we perform TARGETED advertising to them.

An example might be a direct mail letter to businesses that says this:

### 19 Questions Small Business Owners Should Ask **BEFORE** Changing or Hiring Their First Accountant or Bookkeeper.

As your business grows you often need your first or a new accountant to help with your bookkeeping & accounting. Why? To make sure your growth is profitable and sustainable. Plus to let you focus on business sales and operations and not getting bogged down in debits, credits and accounting reports.

That's why I want to give you for free a special report I wrote called: *19 Questions Small Business Owners Should Ask BEFORE Hiring Their First or New Accountant / Bookkeeper*. I'll send it to you if you **call my office** at (phone number) or **go online to request it** at (website address).

# Marketing System Creation & Management Program Implementation

(What We Do & Why)

## 1 Phase 1: Marketing Foundation Assessment

In Phase 1 we start by looking at what have done and are doing today in your practice, in terms of marketing. This is our starting point.

We inventory and analyze any tools and existing systems you're using, how they work or don't and what needs to be created.

We discuss what your business growth plans are. Who and what types of customers or clients you have and want to attract more of. Certain client demographics, types or niches require certain "bait" to attract them into your marketing system.

To build your foundation we look at your current physical (offline) and online presences, advertisements and marketing activities. **The more places** you can be found and researched then the more opportunities we have to capture a potential new client (lead or prospect) in a marketing system. So we look at & ask, do you:

1. Use direct mail letters or postcards?
2. Have a website and how do you use it?
3. Have niche specific landing pages?
4. Use inbound & outbound telephone or appointment setting call scripts?
5. Use educational reports for generating leads?
6. Have a monthly email or print newsletter?
7. Publish a blog or have written books, white papers, case studies or success stories?
8. Use autoresponder systems for follow up?
9. Host regular local teleseminars, webinars, workshops?

This could also be easily changed into a telephone script. But either way it is a no or low risk way (high risk is a sales person walking in my business pitching & pressuring me to change accountants) of a business owner who has some interest level in accounting or bookkeeping services.

If 100-200 business owners respond to this offer, you now have a much smaller, targeted and manageable LEAD list that:

- A) have some interest in your services and,
- B) you can cost effectively create and send *monthly email and physical mail* (and or other advertising efforts) to them, building a case over time why you are the accountant / CPA / bookkeeper to call for their accounting or bookkeeping needs.

This is important because what you've done is taken them **OUT OF THE COMPETITIVE MARKET** and now can probably be the main if not the ONLY source of information that teaches and educates them on the accounting or bookkeeping aspects and needs of their business.

If you are constantly FEEDING them information, educating them on this and related topics they need to know, then you **dramatically DECREASE** the probability of them, going on their own doing research and running across your competition down the street or across town.

YOU become their *logical, best source and obvious choice* for their first or new CPA, accountant or bookkeeper by **ethically precluding the business owner from looking at and comparing you to any other competition** (local CPA, accounting or bookkeeping firms).

To have all this happen you need several TOOLS combined into SYSTEMS that facilitate this process. Here (finally) are the details (described in summary on page 3) of what we do to make this happen.

10. Have a LinkedIn account & are active on it?
11. Have a Facebook Fan page & are active on it?
12. Advertise on Facebook for clients?
13. Have a YouTube account & channel?
14. Use or have company videos and access to a video camera?
15. Have control over your Google+ Local page?
16. Have & ask for Reviews on your Google accounts?
17. Ask for written, audio or video Testimonials for your landing pages?
18. Have control of your local directory listings?
19. Use any local PPC (pay-per-click) advertising on Google Adwords, Bing/Yahoo, Facebook, etc.?
20. Have any TV or Radio spots or commercials?
21. Have any print advertisements for local magazines, newspapers or other print publications?
22. Have a Referral Program or local referral partners?
23. Are you a member of any local networking or chamber groups?

For all the above and more if you do NOT have, have access to or control of these items then **we begin to create, claim and develop them in Phase 2** (according to your business growth goals) to lay the foundation for future marketing activities.

*If you have email addresses, logins and passwords for existing online accounts or listings then we want you to share these with us so we can have access to these and can control and use them on your behalf.*

**NOTE:** Although the work on this Phase 1 setup process starts the 1st month of beginning the program certain portions and elements of it may take longer to create, fine tune and implement.

## **2** Phase 2: Marketing Strategies, Systems & Tools

Once we inventory and evaluate in Phase 1 we begin to **improve on and create** where needed, Marketing Tools that can be combined and integrated into SYSTEMS.

Although there will and should be several marketing systems in place simultaneously working to generate leads, in Phase 2 here is one example of Tools & Systems that will be created:

A report or checklist we often use is titled: **19 Questions Small Business Owners Should Ask BEFORE Changing or Hiring Their First Accountant or Bookkeeper.**

This report is a list of questions you might tell an out of state, good friend or family member they should use if they were going out to shop for an accountant on their own.

The report also has an **Offer** for a Free Private Consultation or 30-Minute Conference Call where the person (business owner) can ask you any question for free with no obligation to hire you.

**We create and then use this report several ways and in different formats.**

One format is a **PDF** that can be posted online and delivered via email.

We put it “behind” a lead generation landing page on a website that offers to give the person the report for free if they give us their email address and name so we can email it to them.

Also ideally on this page there are several written, audio or video testimonials from current clients talking about how trustworthy and reliable you are to them so the visitor who lands there can see your value and instantly trust you.

We drive people to this landing page in several ways to generate leads:



**1** First if we are doing **local pay per click** advertising for words like CPA or accountant we offer the free report in the ad. When people click through then they hit or land on the landing page offering the report.

**2** Second if we are **doing appointment setting** which is telemarketing or calling businesses for appointments, we use this (and other) free reports as a dropback question if we don't get an appointment or use it as the lead question & purpose for the call.

Either way the appointment setter takes the interested business owners email and name, enters into the landing page which triggers the autoresponder to deliver the report and begin a preprogrammed sequence of emails that will be sent as follow up, to the business owner over the next 2-3 weeks.

**3** Third is in a **direct mail letter** focused on a list of targeted business owners. We offer the report in the letter, include a picture or graphic of the report cover, instructing them to go online to the website to request the report.

**4** Fourth is following a **business networking event or meeting** where you meet someone, talk about what you do/they do, offer them the free report and trade business cards.

**NOTE:** This is just 1 “format” of this report. Another format can be a **VIDEO** of the report where you discuss or read each question and talk about what answer they should hear. We take your audio and create a simple video that is posted on your YouTube account and embedded in a webpage on your site, so the business owner can also WATCH the video version of the report.

Another variation would be to have us interview you on a phone call, going over all the 19 questions. We record the interview and use the

audio to create an **AUDIO CD**. The CD can then also be physically mailed to people that request the report (you would need to have their physical address) so they can listen to it in a PC or their car later and repeatedly.

Similar to example 2 with the appointment setter, we take the person's email and name, enter them into the landing page which triggers the autoresponder to deliver the report.

Then the same as before, this begins a preprogrammed sequence of emails that will be sent as follow up, to the business owner over the next 2-3 weeks.

On the autoresponder that is delivered over the next 2-3 weeks, we take the 19 questions and in groups or individually, we review one or more questions and answers, in each email, they should hear in order to evaluate and choose the right accountant or CPA.

Each email is educational and ends with an Offer to take the next step, a Free Private Consultation or 30-Minute Conference Call with you about their current accounting or bookkeeping or a related problem or situation they have.

All the underlying software, emails, reports, tools and systems are what we *create, setup, test and implement* in Phase 2.

And again there **may and should be multiple versions** of these “systems” that we will do concurrently, depending upon what client types and target markets you want to pursue.

If you want to pursue business owners then this entire system would be put in place for that “business owner” target market.

If you want to also pursue and target a specific niche like **dentists & dental practice**, then we would also take the tools in the system and

customize them specifically for dentists and run it concurrently with your other systems.

Additionally with these types of activities we will also put in place an ongoing monthly newsletter that can be emails and/or mailed to clients and leads.

We also encourage monthly, bimonthly or quarterly teleseminars / webinars on related accounting, bookkeeping, tax, finance, investing or other topics to invite leads to and make offers on services.

All this leads up to the creation of a rolling 12-month marketing calendar that we use to keep our marketing plans and activities on track.

### **3 Phase 3: Advertising, Selling & Servicing Management**

In this phase we are **monitoring, evaluating, reporting** and *where appropriate enhancing and improving* all the Tools and Systems in Phases 1 & 2 depending upon the:

- Results we are generating plus,
- Reactions to competition in your market and,
- Changes in your business model or growth goals as we go forward.

If for example we start with Google Adwords as a means to attract dental practice clients and we are not generating leads in the volume we want or they are too expensive, we may switch strategies and media.

We might take the Adwords budget and test direct mail to a list of dentists. Sending them a 3 letter series or maybe an audio CD with a specific offer.

Or we may test local dental practice workshops and find it is more cost effective to get dentists to a local workshop on a Saturday morning than it is to try to get them on the phone during

practice office hours (while they have their hands in patient mouths).

These are hypothetical examples but the process is to reinforce what is working, enhance it to make it more effective and stop or change what is not working.

In any case the ongoing scheduling and delivery of marketing messages in the forms of enewletters, physical mailings, social media posts, audio replay and video distribution, as well as the tracking & reporting is the ongoing part and Phase 3 element of the program.

## **What's The Next Step? How To Get Started...**

On the last page (page 12) of this document is the **Order Form** for the program.

- First, fill out the top part of the form as best you can. Scan & email to [jeffbell@mynewcpa.com](mailto:jeffbell@mynewcpa.com)
- Second, on the bottom or lower half choose the Gold or Silver program (*pick Silver unless we have specifically discussed Gold*) and then **fill in the Credit Card information** for the monthly billing portion of the program (\$495).
- Third, make a **check (for Setup Fee)** payable to Sales and Marketing Results and **mail it** with a copy of the order form to:



Jeff Bell  
Sales and Marketing Results  
PO Box 267  
Noblesville, IN 46061



# **Sales and Marketing RESULTS**

# MARKETING SYSTEM CREATION & MANAGEMENT PROGRAM

Audio Testimonials (Transcribed) from [www.MyNewCPA.com](http://www.MyNewCPA.com) on Jeff Bell & Sales and Marketing Results



We have used Jeff Bell for more than 3 years in eNewsletters, seminars and other marketing items. We use Jeff's set up on autoresponders & eNewsletter so that when we see somebody or we get a new company that we want to market to, before I see them they're sent emails through Jeff Bell and we introduce ourselves. And then afterwards we put that email address on regular marketing system so through Jeff's system we drip marketing materials on the client such as an enewsletter. They're informed of teleseminars that we do through Jeff that he moderates. I can remember in January of one year, and I got a call from the client and they had opted in through the landing page that Jeff set up and begin the send them newsletters and other information on teleseminars and after about 3 months they called me up and I went to see them. They were kind of previously sold on us. They had known so much about us and I can remember I know it was a decision to spend \$500 a month with Jeff but just with that one client, **they give us a check for \$8,000, they became a new client. So I found it very a very good investment to work with Jeff Bell**, it'll pay back, it's really just a modest investment. All you need to do is get a few clients year and it makes it worthwhile.

Paul Sullivan, CPA - President | Sullivan & Co. CPAs | Bethesda, MD | [www.eSullivan.net](http://www.eSullivan.net)



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](http://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](http://www.EnviroMedGroup.com)



Hi this is Ed Newton, I'm a CPA & CFP from Charlotte, NC. We've been using Jeff for almost a year now to help us market our financial services and assist us with communicating with clients in a more efficient & cost effective manner. Before we hired Jeff we were not sure how to market our services or how best to utilize the technology available to provide our clients with the best service we possible could. Jeff always has time for our questions no matter how mundane or simple they are. He is one reason why **our financial services company has grown at a 50% growth rate over the last year.** I highly recommend Jeff to you if you want to have a marketing professional on staff.

Ed Newton, CPA/CFP | Newton Financial Network | Charlotte, NC | [www.ednewtoncpa.com](http://www.ednewtoncpa.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](http://www.MidwestBankers.com)

# MARKETING SYSTEM CREATION & MANAGEMENT ORDER FORM

Please complete and mail or return via email. Leave questions or comments on voice message at 317-643-5333.

Your Name \_\_\_\_\_

Practice Name \_\_\_\_\_

Billing Address \_\_\_\_\_

Physical Address (if different) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Office Phone \_\_\_\_\_ Fax \_\_\_\_\_

Primary Email Address \_\_\_\_\_

Web Site Address(s) \_\_\_\_\_

Est Num. of Clients (Active) \_\_\_\_\_ (Inactive) \_\_\_\_\_ (Total in your database) \_\_\_\_\_

Of Total Client Records in database, estimate number of emails addresses \_\_\_\_\_ # Staff \_\_\_\_\_

Avg Monthly \$ Billing Per Client: \$ \_\_\_\_\_ Avg # of Years Clients stay a Client \_\_\_\_\_

<b>GOLD Program</b>	<b>1-Time Setup Fee</b>	<b>Ongoing Monthly Fee</b>	<b>SILVER Program</b>	<b>1-Time Setup Fee</b>	<b>Ongoing Monthly Fee</b>
Audio Generator Δ	\$ 0	\$ 30 Δ	Audio Generator Δ	\$ 0	\$ 30 Δ
iContact Email †	\$ 0	\$ 14 †	iContact Email †	\$ 0	\$ 14 †
ART 24 Hr Message Line	\$ 199	\$ 96	Jeff Bell-Sales & Marketing Results	<b>\$2,995</b>	<b>\$ 495</b>
Jeff Bell-Sales & Marketing Results	<b>\$2,995</b>	<b>\$ 495</b>	Google Adwords ††	\$ 5	\$ to be determined ††
Google Adwords ††	\$ 5	\$ to be determined ††	<b>Sub Total</b>	<b>\$ 3,000</b>	<b>\$ 539</b>
<b>Sub Total</b>	<b>\$ 3,199</b>	<b>\$ 635</b>			

† iContact is billed directly to you starting at \$14/mth up to 500 subscribers with rate increases as your subscribers go up.  
 †† Google Adwords is billed directly to you based on \$ keyword bids & budget limits we agree upon and can adjust over time.

Δ Audio Generator for Audio TESTIMONIALS, is billed directly to you at a flat rate of \$30/month regardless of # of testimonials

## Marketing Program: Silver or Gold have 1-time Setup Fee of \$2,995

[ ] Silver Program @ \$495 / month + Audio Gen Δ (\$30/mth) + iContact † (\$14/mth)

[ ] Gold Program @ \$495 / month + Audio Gen Δ (\$30/mth) + iContact † (\$14/mth)  
 Plus ART message line (\$199 1-time setup + \$96/month)

## Credit Card Information

Name on Card \_\_\_\_\_

Card Number \_\_\_\_\_

Expiration Date \_\_\_\_\_ Security Code (on back) \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Please complete and MAIL to: Jeff Bell, PO Box 267, Noblesville, IN 46061 or scan & email to [jeffbell@mynewcpa.com](mailto:jeffbell@mynewcpa.com)