

Marketing Assets Checklist

Use this resource to benchmark how well your marketing assets are working for your firm. An explanation of how to implement each idea follows the checklist.

The Essentials

Check

- Company logo accurately represents your brand
- Firm website is up-to-date, has a modern look and generates traffic

Strategy

Check

- Clear ideal client profile used for targeting new prospects
- You've developed a unique value proposition
- A concise and compelling elevator pitch is communicated to all staff
- You have a marketing plan with measurable outcomes

Marketing Material

Check

- Printed collateral (flyers or brochures) available for those who request copies
- Business cards have calls to action and the value proposition
- Templates exist for company emails/newsletters/presentations
- Branded presentations (ie powerpoints) are available to access
- Thought leadership articles are created regularly

Digital Marketing

Check

- Email marketing software is used to send campaigns
- Social media pages are set up for your firm
- Lead magnets are visible on your website
- Blog on company website

Budget

Check

- A marketing budget is allocated for approved activities

Referrals

Check

- System for getting referrals from clients

Communications

Check

- Company voice and tone guide is used for all communications
- At least one video

Success

Check

- Methods for measuring the success of your marketing efforts

Marketing Assets Explanations

Ideal client profile

Marketing to everybody is marketing to nobody. Understanding who you're targeting is the only way to be successful in marketing. Many accountants and bookkeepers tell us they target "small business owners", but this isn't specific enough. Think about the clients you enjoy working with - what attributes do they have? Are they in a certain industry? Do they share similar struggles? Do the people involved have certain characteristics? Narrowing your focus is the only way to have a strong appeal to your market.

You can also think about the clients you would rather avoid as it's important to learn who to say no to as well.

Value proposition

Your unique value proposition is a clear statement that describes the benefits of working with your firm. It should mention how you help solve your client's pain points and what makes you different from your competition.

Elevator pitch

Your elevator pitch should be a succinct and persuasive pitch used to spark interest in your firm and what you do differently. It's important that all staff know this and can communicate it well.

Marketing plan

A good marketing plan details the strategy your firm will use to market your services to your customers. It should cover your target market, their pain points, your value proposition and the campaigns you will deliver.

Thought leadership articles

We recommend you regularly release articles that showcase your authority in your field. This type of content is a great way to demonstrate your expertise, keep your website and social media pages fresh and stay top-of-mind with your audience. Wondering where to start? Think about the newsletters, articles, blogs or podcasts you consume - what do you like about them?

Email marketing software

By most measures, the ROI for email marketing is double any other digital marketing channel. In fact, email marketing returns an incredible [\\$44 for every \\$1 spent](#).

It's particularly useful for the accounting industry and we really encourage you to send email blasts, email newsletters and automated nurturing emails to clients and prospects regularly. Keeping your firm top of mind is the best marketing you can do.

There are a few email marketing platforms to choose from including MailChimp, InfusionSoft, Active Campaign, Campaign Monitor and Bizink Email Marketing.

Lead magnet

A lead magnet encourages website visitors to give you their contact information, most commonly in the form of their email address. Lead magnets include blog subscriptions; gated e-books, case studies or white papers; quizzes or calculators; or anything else that encourages a person to give you their contact info.



Marketing Assets Explanations

Allocated Marketing Budget

You should be investing time, money and resources into marketing, otherwise you can't expect to get new clients, keep your existing client base happy or grow your firm.

For accountants and bookkeepers, your clients stay with you for a while. Your churn rate is low but the lifetime value of your clients is high. So you need to spend that money upfront. If you're a startup firm you don't have much cash but you do have time.

Referrals system

There are a range of tactics you can use here but it's really just as simple as asking. We suggest you ask clients in your regular meetings, over the phone, in your next email newsletter and even in a dedicated email campaign. It's helpful to tell clients that you have enjoyed working with them and want more clients like them (particularly if you serve a niche).

Videos

Video can be really effective online. You can add personality to your company and also explain your services in an authentic and engaging way. You might consider an introductory video when people land on your site, a Q&A video where you answer common questions, or a deep dive into how things work at your firm.

Success

You wouldn't play sports without keeping score, right? So why invest time, money and effort into your marketing without keeping track of the results? A simple scorecard can help you track how your ongoing marketing efforts are performing. We recommend staying away from "vanity metrics" like website visitors and number of social media followers. Focus on the number of new leads, new email subscribers, sales meetings and obviously conversions to new clients.

Connect with us

We are here to help. Talk to one of our small business advisors today.

Phone 254.401.5750

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