



# The CPD Fest 2020

## Technology & Growth Strategies to Get Ahead

### Presenter:

Des O'Neill – OmniPro

Sponsored by :-



[www.CPDStore.com](http://www.CPDStore.com)

**Core Technical Online CPD for Irish Accountants  
Tax, Audit, Financial Reporting, Insolvency, Company Law, Regulation,  
Management Accounting & Business Skills**



continuing  
professional  
development

**OmniPro Education & Training**  
Main Street, Ferns, Enniscorthy, Co. Wexford  
053 910 0000  
[www.omniopro.ie](http://www.omniopro.ie) [info@omniopro.ie](mailto:info@omniopro.ie)



**Table of Contents:**

Practically Building Your Tech Stack Presentation.....	1
The Technology Transformer Tool.....	6
The 6 Step Success Path.....	7
Building Your Tech Stack Self-Assessment Questionnaire .....	8
Create A Red Velvet Rope Policy .....	16
Defining Your Ideal Customer.....	18
Customer Avatar Worksheet .....	21
Pick a Niche.....	22
Template Customer Grading Matrix Complete .....	26
Business Development 101 Blueprint for Accountants.....	27
The Strategy Creator.....	53

[www.CPDStore.com](http://www.CPDStore.com)

**Core Technical Online CPD for Irish Accountants  
Tax, Audit, Financial Reporting, Insolvency, Company Law, Regulation,  
Management Accounting & Business Skills**



**PROFIT PRO**

## Technology and Growth Strategies to Get Ahead

ProfitCon – Session 3  
Friday 18<sup>th</sup> of December

1

---

---

---

---

---

---

---

---

### The Business of Accounting is a Simple One

- Have a plan
- Get good people
- Identify what is a good customers and serve them
- Deliver what customers want and need
- Bill it and collect it
- Get your people working in a structured way
- Scale it to what you want

**PROFIT PRO**

2

---

---

---

---

---

---

---

---

### What are the 6 Steps to Success?

- Step 1 – Your Trajectory and Your Destination
  - What do you want? Not what I think you want. Not what other people have. What do you want?
- Step 2 – Who not How
  - The answer to every problem you will ever encounter is a question – Think Who
- Step 3 – Nurturing Your Greatest Asset
  - The value is in your customer list.
- Step 4 – The 4 P's Proposition, Positioning, Product & Price
  - This is a key driver of your strategy and your success
- Step 5 – The Quick Win Growth Process
  - Always think simple and look for the quick wins
- Step 6 – Leveraging Your Business
  - Automation, Systemisation, Marketing, Sales, Management

**PROFIT PRO**

3

---

---

---

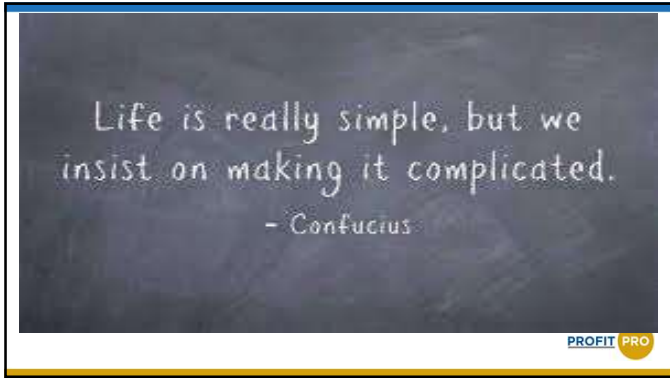
---

---

---

---

---



4

---

---

---

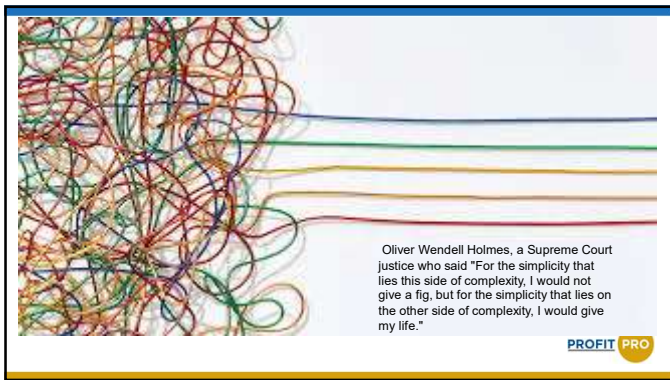
---

---

---

---

---



5

---

---

---

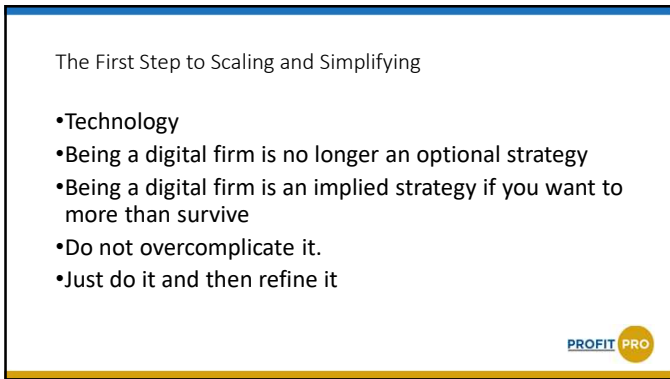
---

---

---

---

---



6

---

---

---

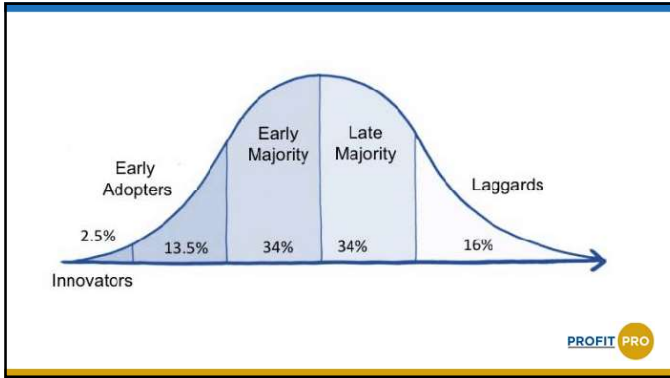
---

---

---

---

---



7

---

---

---

---

---

---

---

---



8

---

---

---

---

---

---

---

---

Technology 101 – For Clients

- Hero software / Bookkeeping Software
- Bank feeds and invoice automation
- Expense Management
- Credit Control
- Invoicing and Collections
- Forecasting

9

---

---

---

---

---


---

---

---

Technology 101 – For You

- Hero software / Bookkeeping Software
- Bank feeds and invoice automation
- Practice Management
- Expense Management
- Credit Control
- Invoicing and Collections
- Financial Reporting
- Portals/ Paperless Office



10

---

---

---

---

---


---

---

---

The Solution to All Problems - Growth

- Grow you
- Grow your mindset
- Grow your capabilities
- Grow your team
- Grow your client list
- Grow your clients
- Grow your technology
- Grow your leverage



11

---

---

---

---

---

---

---

---



Let Your Enterprise Benefit From Ours

www.omnipro.ie

### Think Growth – Business Development 101 for Accountants

<ul style="list-style-type: none"><li>• Your Strategy and Positioning</li><li>• Self Assessment</li><li>• Customer Classification</li><li>• Red Velvet Rope Policy</li><li>• Defining your Ideal Customer</li><li>• Niching</li><li>• Become a Category Authority</li><li>• Basic Credibility Builders</li><li>• Focus</li></ul>	<ul style="list-style-type: none"><li>• The 6 Pillars of Accounting Firm Marketing</li><li>• Networking</li><li>• Direct Outreach</li><li>• Referrals</li><li>• Writing</li><li>• Speaking</li><li>• The Web</li><li>• Email Marketing</li><li>• Integrated Sales Process</li></ul>
--	---

12

---

---

---

---

---

---

---

---

**OMNiPRO**  
Let Your Experience Benefit From Ours www.omnipro.ie

**The Real Solution to All Problems**

- Take Action
- What are you going to do?

13

---

---

---

---

---

---

---

---

**The ProfitPro Why**

Our core belief is simply this: Accountants can and do change lives, so we get up every morning to bring them tools, advice and training so that they can build outstanding businesses for themselves and their clients too. In this way we change lives communities and our world. We would love to do that together with you

PROFIT PRO

14

---

---

---

---

---

---

---

---

**Why Des O'Neill?**

The Des O'Neill Why

I wake up every morning driven to realise my own true potential in life and in business. In realising my own potential I inspire & motivate others to do the same. Together we change the world.

PROFIT PRO

15

---

---

---

---

---

---

---

---

## THE TRANSFORMER TOOL

### The Experience You Want to Transform

**1. Briefly describe the experience you'd like to improve and learn from**

**2. WHAT'S WORKING? WHAT WORKED**

**3. WHAT'S NOT? WHAT DIDN'T?**

**4. IMPROVEMENT**

**5. ACTION**

Knowing what you know now, how could you enhance or refine this experience?

What would produce a much more strategic, successful and satisfying experience in the future?

**1.**

**2.**

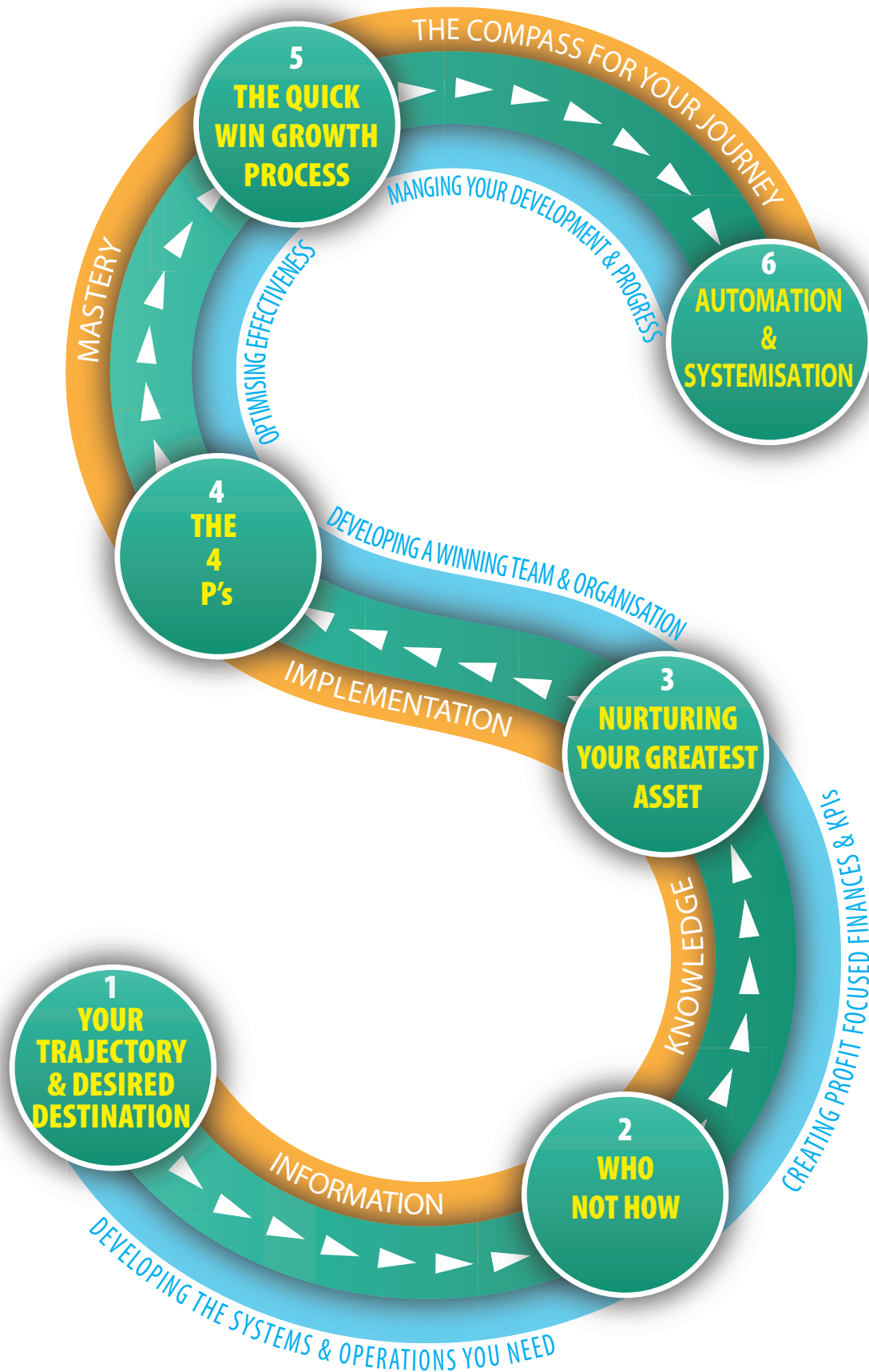
**3.**

**4.**

**5.**



## 6-Step Success Path



## BUILDING YOUR TECH STACK



Name:

Date:

INITIAL SELF ASSESSMENT – List Products and Apps:		
<i>Score your existing Tech Stack (The Software, Apps, Providers, Tools and Services you currently use) or if you want to focus on one particular piece of software assess it under each of the following areas:</i>	MAXIMUM SCORE	YOUR SCORE
<b>Firm &amp; Partner/Principal Outcomes</b> Does your current tech stack give the firm and the owners what they really want?	20	
<b>Business Needs and Strategy</b> Does your current tech stack and delivery align with the firms trajectory and desired strategic outcomes?	20	
<b>Team Needs and Facilitation</b> Does your current tech stack meet the needs of your team and enable them work as flexibly and effectively as they want and need?	20	
<b>Operational Efficiency</b> Does your current tech stack reduce manual processing and optimise operational efficiency?	20	
<b>Outputs and Deliverables</b> Does your tech stack produce the outputs and deliverables that both your team and your customers need?	20	
<b>Customer Needs and Service</b> Does your current tech stack simplify and improve the customer experience giving them what they need?	20	
<b>Customer Added Value Opportunity</b> Does your current tech stack create opportunities for you to provide more value to your customers?	20	
<b>Customer Experience</b> Does your current tech stack enhance and optimise customer your customer experience?	20	
<b>Firm Wide Integration</b> Is your tech stack fully integrated throughout the firm and across the full customer portfolio or is there only partial implementation?	20	
<b>Unbiased User Reviews</b> Based on the component parts of your tech stack what does the market feedback say about your applications irrespective of you and your team’s opinion?	20	
<b>Reliability and Uptime</b> Every software provider talks about 99.9% uptime but what is the real reliability of your tech stack and the uptime?	20	
<b>Open or Closed Platform</b> Is your tech stack an open platform whereby it easily integrates with other software products and non-native applications or is it a closed platform where you can really only use products and apps developed by the primary provider?	20	
<b>Eco-System and Integrations</b> Does your tech stack have access to a wider eco-system of applications and integrations that can add value to your customers by providing bespoke solutions that makes their life easier?	20	
<b>Market Capitalisation and Funding</b> Are your primary applications and software providers well capitalised and funded so that they can evolve, develop, and innovate as technology evolves develops and innovates?	20	
<b>Past and Planned Development Path</b> Does your tech stack providers have a history of innovative developments and a clear plan and pathway for future developments?	20	
<b>Total Score</b>	<b>300</b>	
<b>ADDITIONAL COMMENTS/FEEDBACK</b>		

## BUILDING YOUR TECH STACK



DEEPER ASSESSMENT – Current Tech Stack or Specific Software/ App/ Product/ Tool Service	
STRENGTHS	WEAKNESSES
THREATS	POSITIVIE OPPORTUNITIES
COMPARISONS	OVERALL ASSESSMENTS
NEXT STEPS/DECISIONS	
1.	
2.	
3.	
4.	
5.	

## GUIDANCE ON BUILDING YOUR TECH STACK

### What does the Firm Owner and the Firm Want and Need?

- The End Result
- Customer Service
- Profitability
- Cost Effective
- Peace of Mind
- Hassle Free
- Usefulness
- Simplicity
- Lego Block Building
- Now and the Future

### What do the Team Want and Need?

- The End Result
- Customer Service
- Speed
- Efficiency
- Reliability
- Confidence
- Accessibility
- Collaboration
- Support
- Training

### What do the Customers Want and Need?

- The End Result
- Interactivity
- Accessibility
- Reliability
- Confidence
- Accessibility
- Collaboration
- Support
- Connection
- Profitability

### Product Options

- CRM
  - One source of information that feeds everything else
  - Track customer details
  - Track customer information
  - Track communications
  - Track servicing
  - Emails and contact details
  - Central Hub of the business
    - Workflow
    - Billing
    - Internal reporting KPIS
    - Client Communications
    - Portal Customer Documents
  - What are the options for this area?
  - Do any of the options for this area also fit other considerations and requirements of the business?

### Workflow Management

- Track Jobs
- Anticipate Spare Capacity
- Anticipate squeezed resources
- Helping with team management
- Helping with customer deadline management
- Deadline Management
- Project Management
- Visibility
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Firm Profitability KPIS

- Dashboard
  - Critical information at a glance
- Mining Capabilities
  - Going deeper
  - Customising for the firm
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Client Communications

- Basic Communications
  - Text
  - Email
  - Call tracking
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Bookkeeping and Customer Accounting

- Bookkeeping package
- Automatic Document exchange / bank account
- Payroll
- Expense management
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Financial Statements

- Produce statutory accounts
- Link seamlessly into bookkeeping software
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Customer Service

- Budgeting
- Cashflows
- Project Management
- Bespoke Apps and Integrations
- Expense management
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Firm Accounting

- Time tracking
- Job profitability
- Billing
  - Invoice Automation
- Collections
  - DD
  - Auto Payments
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Proposals and Onboarding

- Meet a new customer
  - Transitioning an existing customer
- Pricing Models
- Bespoke Proposals
- Approval and auto sign up
- Payment and billing system
- AML
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Signing and document approval

- One stop shop
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

## BUILDING YOUR TECH STACK



### Client Portal

- Client documents
- Information exchange
- Firm Outputs
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Paperless

- Create a paperless office
- Paperless internally
- More streamlined externally
- Efficiency
- GDPR
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Website

- Awareness Tool
- Marketing Tool
- Business Development Tool
  - On the spot quoting
  - On the spot customer care
  - Diary Management
- Customer Service Tool
  - On the spot customer care
  - Diary Management
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

### Diary Management

- Internal External
  - Outlook - Internally
  - Calendly - External
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?



### Team Communications

- Reduce the email flow
- Easier communications
- Easier insights and overview
- What are the options for this area?
- Do any of the options for this area also fit other considerations and requirements of the business?

## YOUR RED VELVET ROPE POLICY

### CREATE A BASIC RED VELVET ROPE POLICY

1. Characteristics – What type of people do you and your team really enjoy working with?

2. Characteristics – Write down the names of some of your existing ideal customers.

3. Characteristics - What is it about them that you enjoy or makes them easier to work with?

4. Characteristics – Write down the names of some of your existing customers that you no longer want to work with. Your worst customers.

5. Characteristics - What is it about them that you don't enjoy or makes them difficult to work with?

## YOUR RED VELVET ROPE POLICY

6. Business Profile – What are the indicators and common characteristics from a business perspective of your favourite customers?

7. Fee Focus - What is the minimum turnover / profitability of a customer before we will accept them?

8. Fee Focus - What is the minimum personal income level before we will accept a customer?

9. Fee Focus - What is the minimum fee and profitability we need to be able to generate before we will accept a customer?

10. Sector Focus - What categories or sectors of customers will we not accept.

## DEFINING YOUR IDEAL CUSTOMER – YOUR AVATAR

Your Avatar is representative of our typical or ideal customer. You may have multiple Avatars. Never forget we are not our market!

When creating our offers and our marketing you need to focus on your prospects – not yourself, your friends or your family.

Your Avatar is a great tool to help you do that

1. WHAT IS YOUR AVATAR'S BIGGEST FRUSTRATION? WHAT KEEPS THEM UP AT NIGHT?

2. WHAT SCARES YOUR AVATAR? WHAT ARE THEY AFRAID OF?

3. WHAT MAKES YOUR AVATAR ANGRY OR MAD?

## DEFINING YOUR IDEAL CUSTOMER – YOUR AVATAR

4. IN WHAT WAY DOES YOUR AVATAR FEEL DISRESPECTED? WHO DOESN'T RESPECT THEM? WHAT DOES IS FEEL LIKE FOR THEM NOT TO BE RESPECTED?

5. WHAT ARE YOUR AVATAR'S HOPES AND DREAMS? WHO OR WHAT DO THEY ASPIRE TO BE?

6. WHAT IS OUR AVATAR'S GREATEST OPPORTUNITIES? ARE THERE OPPORTUNITIES THEY DON'T EVEN KNOW ABOUT?

## DEFINING YOUR IDEAL CUSTOMER – YOUR AVATAR

7. WHAT IS OUR AVATAR'S BIGGEST STRENGTHS? ARE THERE STRENGTHS OR RESOURCES THAT HAVE THAT THEY DON'T EVEN KNOW ABOUT?

8. IN SUMMARY – YOUR IDEAL CUSTOMERS OR YOUR AVATAR'S ARE:

## CUSTOMER AVATAR WORKSHEET

1. CUSTOMER DETAILS:		2. BUSINESS INFORMATION	
NAME:		TURNOVER:	
AGE:		PROFIT:	
GENDER		SALARY/PERSONAL INCOME:	
MARITAL STATUS:		ROLE	
#/AGE OF CHILDREN:		INDUSTRY SECTOR	
LOCATION			
3. GOALS & VALUES		4. KEY CHALLENGES & PAIN POINTS	
GOALS:		CHALLENGES:	
VALUES		PAIN POINTS	
WHAT ARE WE GOING TO DO WITH AND FOR THEM?			
FEE LEVEL:			
SERVICES THEY NEED:			

## PICK YOUR NICHE

1. WHO ARE 5 TO 6 DIFFERENT TYPES OR INDUSTRY SECTORS THAT ENGAGE AND COULD BENEFIT FROM THE SERVICES THAT I PROVIDE?

2. WITHIN THOSE BUSINESS TYPES OR INDUSTRY SECTORS WHO IS MY AVATAR?

3. WHICH BUSINESS TYPES OR INDUSTRY SECTORS DO I KNOW PEOPLE IN OR ALREADY HAVE CUSTOMERS IN?

4. IN WHAT INDUSTRY SECTOR OR BUSINESS TYPES AM I MOST LIKELY TO FIND MY IDEAL CUSTOMER AVATAR?



## PICK YOUR NICHE

5. WHICH BUSINESS TYPES OR INDUSTRY SECTORS DO I HAVE THE MOST KNOWLEDGE IN?

6. WHICH INDUSTRY SECTORS OR BUSINESS TYPES DO I REALLY ENJOY WORKING WITH AND KNOW THAT I DO MY BEST WORK IN THAT CAN CREATE TANGIBLE BENEFITS FOR CLIENTS?

7. WHICH INDUSTRY SECTORS OR NICHE AREAS ARE FAMILIAR AND COMFORTABLE WITH PAYING FEES AT A LEVEL THAT ARE ALIGNED WITH MY BUSINESS STRATEGY?

8. WHAT INDUSTRY SECTORS OR NICE AREAS ARE FAMILIAR AND COMFORTABLE WITH ENGAGING PROFESSIONAL ADVISORS TO HELP THEM ACHIEVE THEIR DESIRED RESULTS?

## PICK YOUR NICHE

9. WHAT ARE MY GREATEST PASSIONS RELATED TO MY WORK?

10. WHAT ARE MY NATURAL TALENTS THAT I BRING TO MY WORK AND WHAT BUSINESS SECTORS CAN THEY MOST BENEFIT?

11. WHAT ARE MY LIFE SITUATIONS OR ROLES THAT MY MARKET MIGHT IDENTIFY WITH?

## PICK YOUR NICHE

### 12. LIST THE POSSIBLE NICHE MARKET AND CHOOSE YOUR FIRST ONE TO GO AFTER

POSSIBLE NICHE MARKET 1:

POSSIBLE NICHE MARKET 2:

POSSIBLE NICHE MARKET 3:

POSSIBLE NICHE MARKET 4:

POSSIBLE NICHE MARKET 5:

MY NICHE MARKET

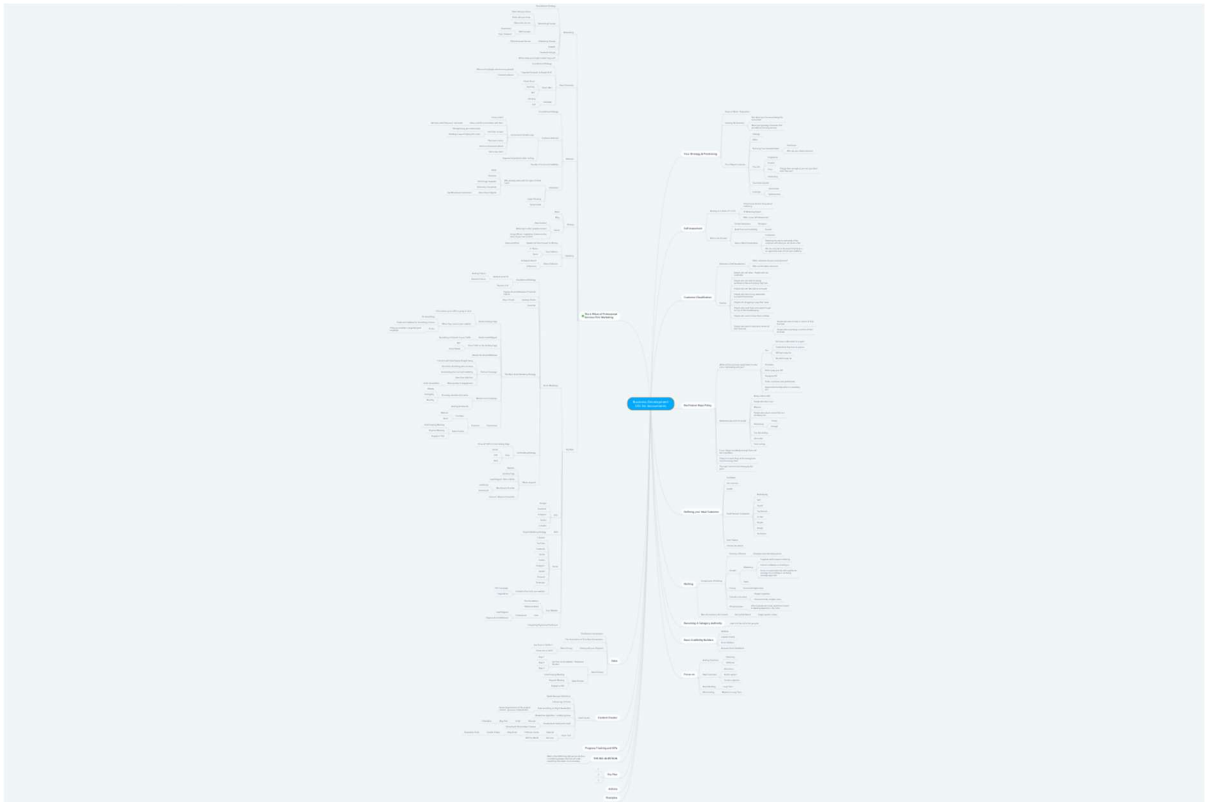
## COMPLEX CLIENT CLASSIFICATION MATRIX

CLIENT CLASSIFICATION MATRIX									
CLIENT NAME	FIRM INDICATORS			OVERALL DRIVERS		CLIENT INDICATORS			CLIENT SCORE
	FEE SCALE 1-10	CASH FLOW CATEGORISATION 1-10	RECOVERABILITY 1-10	LIKABILITY 1-20	THE IDEAL CLIENT AVATAR 1-20	SERVICE AFFORDABILITY 1-10	VALUE PERCEPTION 1-10	FUTURE POTENTIAL 1-10	

- A** — All-Stars — 80 - 100
- B** — Potential All-Stars — 50 - 80
- C** — Compromised — 20 - 50
- D** — Duds — 0 - 20



# Business Development 101 for Accountants



A Personalised CPD Certificate of Completion will be forwarded to you upon completion of this course.  
These notes do not serve as proof of completion alone.

## Your Strategy & Positioning

Peace of Mind - Proposition

Growing the business

Not about you the owner being the accountant

About you growing a business that provides accounting services

The 6 Steps to Success

Strategy

Whos

Nurturing Your Greatest Asset

Customers

Who are your ideal customers

The 4 Ps

Proposition

Product

Price

Charge them enough so you can give them what they want

Positioning

Quick Win Growth

Leverage

Automation

Systemisation

## Self Assessment

Ranking on a Scale of 1 to 10

1 Dont know the first thing about marketing

10 Marketing Expert

What is your Self Assessment

What is the Process

Create Awareness

Strangers

Build Trust and Credibility

Friends

Have a Sales Conversation

Customers

Matching the wants and needs of the customer with what you can do as a firm

We can only sell to the extent that there is an appropriate level of trust and credibility



## Customer Classification

### Extension of Self Assessment

What customers do you currently serve?

Who are the ideal customers

### Positive

People who will listen - People who are coachable

People who are used to paying professional fees and paying high fees

People who will take advice on board

People who are running reasonably successful businesses

People not struggling to pay their taxes

People who need help and support to get on top of their bookkeeping

People who want to know their numbers

People who want to take back control of their business

People who want to feel in control of their business

People who love being in control of their business

## Red Velvet Rope Policy

What are the minimum parameters to enter into a relationship with you?

Tax

Not even a discussion its a given

Understand they have to pay tax

Willing to pay tax

Be able to pay tax

Profitable

Able to pay your Bill

Paying by DD

Polite, courteous and professional

Appreciate the help rather an necessary evil

Behaviours you will not accept

Being rude to staff

People who dont care

Messers

People who see an accountant as a necessary evil

Not paying

Timely

Enough

Too demanding

Life sucker

Time sucking

If you charge somebody enough there will be no problem

There is no such thing as the wrong price only the wrong client

The right customer will always pay the price

## Defining your Ideal Customer

Profitable

All in service

Audits

Audit Exempt Companies

Bookkeeping

VAT

Payroll

Tax Returns

Co Sec

Simple

Steady

No Drama

Sole Traders

Income tax returns

## Niching

### Components of Niching

Delivery of Service

Develop a standardised play book

Growth

Marketing

Targeted and focussed marketing

Cannon or Bazuka vs a hand gun

Focus in a particular area with a particular message Vs a scattergun confusing message approach

Sales

Pricing

Command higher Fees

Provide more value

Deeper expertise

Perceived to be a higher value

Attracting team

Attract people who have expertise or want to develop expertise in the niche

### Main Accountancy Firm brand

Set up Sub Brand

Target specific niches

## Becoming A Category Authority

Links into the niche that you pick

## Basic Credibility Builders

Website

Linkedin Profile

Email Address

Business Card/ Headshots

## Focus on

Existing Customer

Retaining

Refferrals

New Customers

Short term

Build a system

Create a pipeline

Brand Building

Long Term

Who Hunting

Medium to Long Term



## The 6 Pillars of Professional Services Firm Marketing

## Networking

Foundational Strategy

Networking Process

Share what you know

Share who you know

Share who you are

BNI Concept

Givers Gain

Pay it Forward

Networking Groups

Other Business Owners

LinkedIn

Facebook Groups

Where does your target market hang out?

## Direct Outreach

Foundational Strategy

Targeted Outreach to People PtoP

Who are the people who know my people

Financial advisors

Direct Mail

Direct Email

3rd Party

Self

TeleSales

3rd Party

Self

## Referrals

Foundational Strategy

Customer Referrals

Accountants Growth Loop

Have a client

Have a results conversation with them

*Ask them what they want and need*

Get them a result

*Strengthening your relationship*

*Building a way of helping this niche*

They have a story

Ask for a structured referral

Get a new client

Exponential potential when niching

Transfer of Trust and Credibility

Influencers

Who already works with the type of clients I want

QFAs

Solicitors

Technology Suppliers

Stationary Companies

Recruitment Agents

*Eg Who places contractors*

Large following

Social media

Writing

News

Blog

Social

Own Content

Referring to other peoples content

Using Official / Legislative Content as the basis of your own content

Speaking

Speak First then Convert to Writing

Splice and Dice

Your Platform

In Person

Zoom

Other Platforms

Enterprise Board

Influencers

## The Web

Email Marketing

Foundational Strategy

Build an email list

*Existing Clients*

*Potential Clients*

Nurture a list

Capture Email Addresses of Potential Clients

Existing Clients

Stay in Touch

Launches

The Basic Email Marketing Strategy

Build a landing Page

*This is where your traffic is going to land*

*When they come to your website*

*Do Something*

*Trade email address for something of value*

*Or Go*

If they go consider a targeted pixel campaign

Build a Lead Magnet

*Something of Interest to your Traffic*

Drive Traffic to the Landing Page

*PPC*

*Social Media*

Harvest the Email Addresses

Nurture Campaign

*Connect with New People Straight Away*

*Give them something extra as value*

*Accelerating the trust and credibility*

*Have their attention*

*Move quickly to engagement*

*Initial consultation*

Maintenance Campaign

*Providing valuable information*

*Weekly*

*Fortnightly*

*Monthly*

*Existing & Potential*

Promotions

*Potential*

*Pre Sales*

Webinar

Event

*Sales Process*

Initial Scoping Meeting

Proposal Meeting

Engage or Not

List Building Strategy

Drive all Traffic to the Landing Page

How

*Social*

*PPC*

*SEO*

Whats required

Website

Landing Page

Lead Magnet / Ethical Bribe

Mail Service Provider

*mailchimp*

*Infusionsoft*

Internal / External Consultant

PPC

Google

Facebook

Instagram

Twitter

Linkedin

SEO

Digital Marketing Strategy

Social

Linkedin

YouTube

Facebook

TikTok

Twitter

Instagram

Reddit

Pinterest

Periscope

Embed a Pixel onto your website

PPC Campaign

Targeted on

Your Website

The Foundation

Mobile enabled

Nice

Professional

*Lead Magnet*

*Capture Email Addresses*

Integrating Digital and Traditional



## Content Creator

Lead Creator

Reads Business Publication

Follows top 12 Firms

Sees something on Big 4 Newsletters

Quote large sections of the original content - give your interpretation

Researches legislation / underlying issue

Creates basic bulet point script

Descript

Script

*Blog Post*

*Newsletter*

Record with Phone/ Basic Camera

Zoom Call

Descript

5 Minute chunks

*Blog Posts*

*Smaller Videos*

Newsletter Posts

Rev.com

\$20 Per Month

## Sales

The Results Conversation

The Termination of Price Rise Conversation

Closing with your Proposal

Menu Pricing

Live Price in Call No.1

Close Live in Call 2

Sales Process

Get their email address / Telephone Number

Step 1

Step 2

Step 3

Sales Process

Initial Scoping Meeting

Proposal Meeting

Engage or Not

## The Plan

1

2

3

## THE BIG QUESTION

What is the ONE thing that we can do from a marketing perspective that will make everything else easier or unnecessary

## Actions

## Progress Tracking and KPIs

# STRATEGY CREATOR



Name:

Date:

VISION GOAL	VISION RESULT

OPPOSITION/OBSTACLES	TRANSFORMATION/STRATEGIES

ACTION		