

Complete guide to marketing automation for accountants

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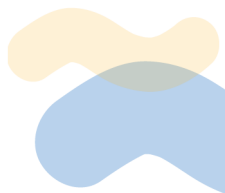
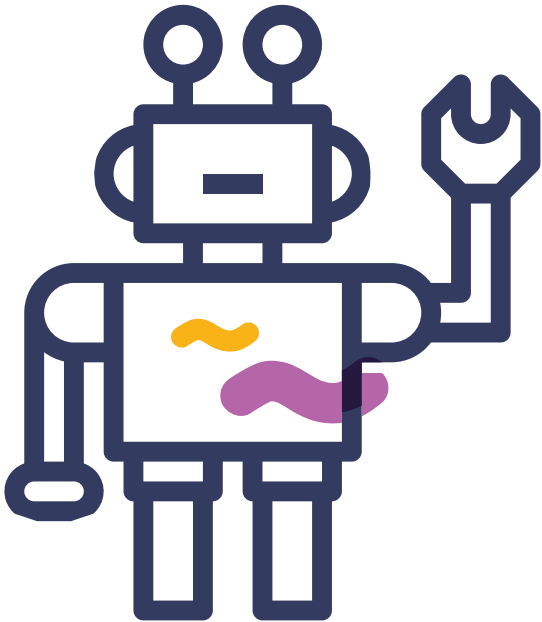
Here at bizink~ we've worked with accountants and bookkeepers from all over the world. Our experience with websites and marketing has given us a clear idea of what works and what doesn't. We've taken the best and presented it in this guide, so that you can get the most out of your marketing.

About the author **Diana Mendoza**

With a background in digital marketing and 12+ years of experience in content creation, Diane is passionate about storytelling and creating a meaningful customer experience. In her current role as marketing operations manager at Bizink, she handles inbound marketing, social media and SEO. Bizink's website and digital marketing platform has automation built in. **Book some time with our team to find out more.**



Why automation?



Why automation?

In the same way you are likely to advocate automation in your clients' businesses when it comes to accounting, automating your marketing is no different.

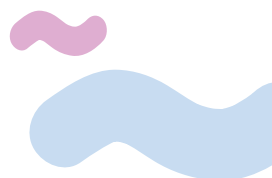
Put simply, marketing automation uses smart software to manage your regular marketing activity. These platforms take care of manual, time-consuming and repetitive tasks – things like email marketing, social media posts and responding to requests on your website – so you can focus on other productive tasks in your role.

After all, time is your most valuable commodity, right?

Automating some of your marketing means that it just gets done without you having to put time aside to make it happen, especially during busy days when it's the last thing you have space for in your schedule.

Automation also amplifies your content by ensuring it's published in places your target audience is looking. Importantly, with automation you can personalise and segment your marketing, giving potential leads information that is most relevant to them.

What's more, it's consistent, and repeatable, and doesn't rely heavily on resources from within your own team, or on large financial investment. Once you set automation up, it can be a budget-friendly way to manage your marketing.



Are you ready for automation?

You've likely said to your clients something along the lines of: garbage in, garbage out when it comes to their financials.

Marketing automation relies on much of the same premise. There's no point automating something that isn't currently working. Good results start with having the right plan in place, and the content to make it happen.

So, before you consider implementing marketing automation in your business, here are three things to check off first:

1.

Get strategic

What are your objectives when it comes to marketing? Who are you trying to reach and what actions do you want them to take? Get a really clear idea of who your target customers are, what messages are most important to them, and what the best way to reach them is. All good marketing is built on a solid strategic foundation. If that's lacking, no amount of automation will get you results.

2.

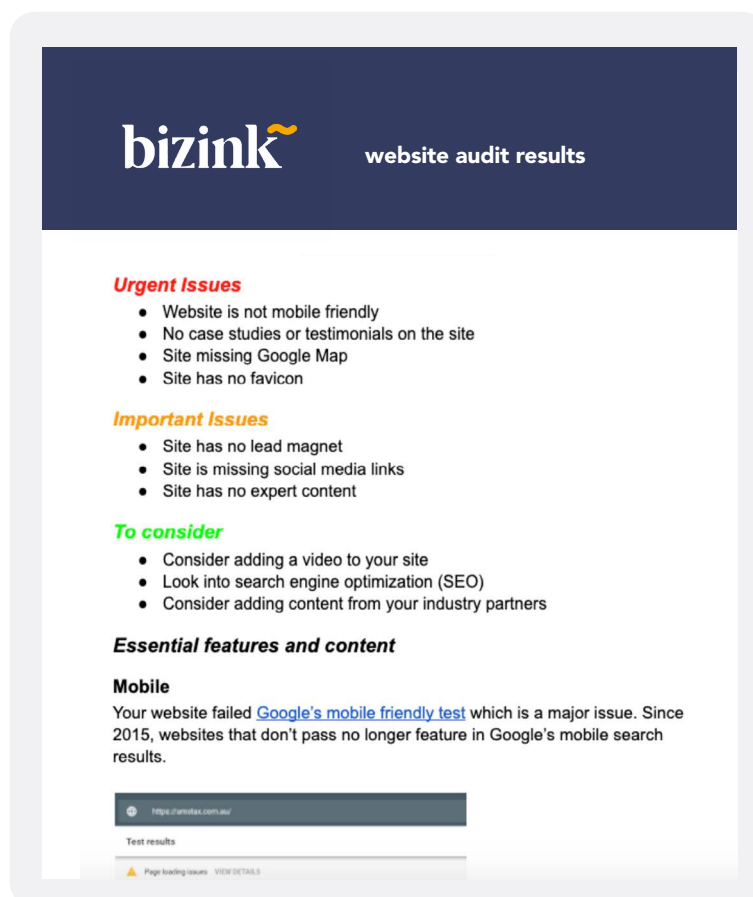
Create good content

Automation is only as good as the content you have available to share. Create a content plan that focuses on topics of interest to your target audience. Your content plan should include regular content like blogs or articles but also things like a downloadable guide, ebook, checklist, templates or helpful resources.

3.

Audit your website

A professional website, with good usability and compelling copy is essential for attracting and capturing leads. For automation, you'll need enough functionality that you can update your site with new content, create lead capture campaigns and share downloadable resources. Bizink has a **free website audit** where one of our team will check out your website and give actionable recommendations.



bizink website audit report example

If you've got those essentials sorted, then it's time to think about what automation you can start to put in place.

What can automation do for your practice?

The ultimate aim of marketing is to generate brand awareness, promote your services and help build a relationship with prospective clients. The thing is, you didn't get into accounting to be a marketer, did you?

With automation you can take care of all the things you know you should be doing to grow your business, while also taking the hard work out of staying in touch with your contacts. Things like:

- Promoting new services or offerings to your database and network
- Keeping clients engaged with regular contact and high-value information
- Reminding clients about important dates or compliance requirements
- Promoting a virtual or in-person event and managing registrations
- Showcasing your expertise with videos, resources, articles and more
- Answering enquiries from leads
- Re-engaging with prospects who have gone cold

So, that's a bit of the what – now let's dig into the how.



Start here



How can you start to automate your marketing?

It might sound complex, but automating your marketing can be as simple as setting up an email autoresponder or streamlining your booking system. Your website and your email database don't have to be static entities – with automation, you can put them to work as an engaging sales and marketing tool, without constant handling by you.

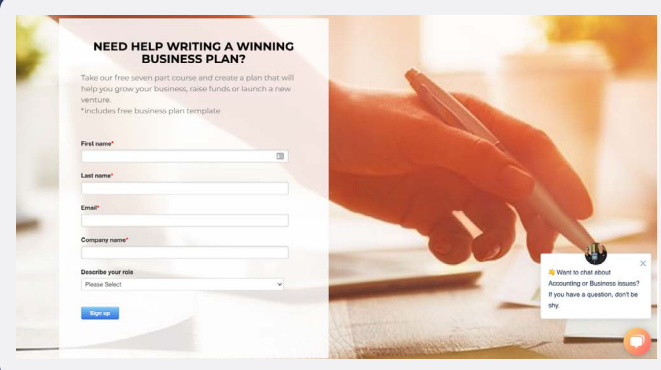
Here are some ways that you can consider automating your marketing across your digital channels: email, website and social media.

Ideas for automating your email marketing

A database is one of the most valuable assets your brand can have. Building a social following is one thing – but you never own that audience as the 45th president of the United States will testify! An email database, on the other hand, is something that you do own. Here are ways you can leverage that value with automation:

Autoresponders

Set up a simple automated response when a potential lead or customer submits their details or completes a form on your website. It simply lets them know their request has been received, and sets expectations around when they'll next hear from you.



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Want to chat about Accounting or Business issues?
If you have a question, don't be shy.

Reminder emails

Set up timely reminders for things like tax deadlines to help your clients keep on top of their compliance.

Drip marketing

Drip marketing requires you to set up a sequence of pre-written emails that is sent to a contact based on specific timelines or actions. For example, you might have an email sequence when nurturing new leads or helping a new customer to navigate your services. Automating these emails saves you from repeating the same process manually, for each new contact.

- 7 steps to increasing profits - Step 1: Increase prices
- 7 steps to increasing profits - Step 3: Improve gross profit
- 7 steps to increasing profits - Step 2: Reduce costs
- 7 steps to increasing profits - Step 4: Review your products

- 7 steps to increasing profits - Step 5: Consider ways to sell more
- 7 steps to increasing profits - Step 6: Early payment
- 7 steps to increasing profits - Step 7: Increase efficiency
- Need more help with increasing profits and keeping more cash in your business?

Marketing funnels

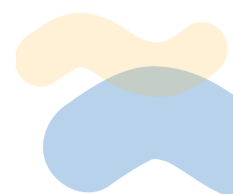
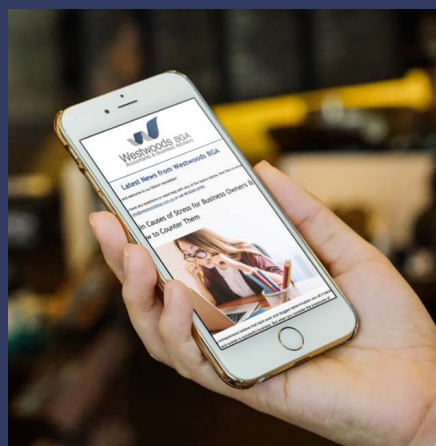
Funnels are a bit of a buzzword at the moment. But the premise of a funnel isn't quite right – it's assuming that your lead's journey is pretty linear, which isn't always the case. Broadly speaking, a funnel is designed to move a lead closer towards becoming a firmer prospect as they consume your content. To do this, you need to create content that caters and appeals to their different levels of awareness. We do know that, on average, a customer needs 5-8 touchpoints with a brand before they make a purchase, so the idea of a

structured communication sequence is important. With the right software, these funnels can be personalised to a lead's journey. For example, they might download a particular ebook, then you might send them an invite to a webinar that you know will interest them (based on their previous download). After they've attended, you might refer them to a specific case study video; once they've viewed that, you could then send a link to schedule a discovery call.

Email newsletter

Having an opt-in option on your website is one way to grow this list, or you can collect contact details through downloads or signups on your site. You can then send out regular emails via an email marketing platform and easily manage subscribes and unsubscribes, without having to manually update lists. Segmentation is also a valuable tool, allowing you to create and send specific content to targeted segments of your audience, based on specific criteria (such as business type, size, services provided, interests).

There are both paid and free options when it comes to email marketing automation - common choices include, Mailchimp, Active Campaign and Campaign Monitor. Bizink offers email marketing automation that is specifically tailored for accountants. Do your research to find which one is right for you; your choice might depend on your budget, the size of your contact list, the number of campaigns you want to run, and how much functionality you need.



Ideas for automating your website

Your website is not just a shopfront; it should be working hard on your behalf, 24/7, as part of your sales team. With a few integrations, your website can be more responsive to enquiries, at the point when new leads come searching.

Put your cookies to use

Using information provided by website cookies (small files used to remember information about a site visitor), you're able to recognise returnee visitors to your website. If that visitor has previously visited your site and downloaded a resource or entered their email address into a form, you can use their recent visit as a trigger to send them an email or target them through social media marketing.

Share to social

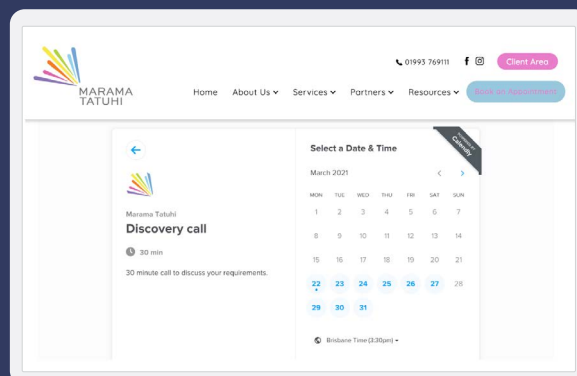
When you add your latest update, blog post or resource to your site, make it easy to send an update to your social followers so they can find it. We offer this feature to Bizink customers – every time you post to your blog, it automatically publishes to channels like Twitter, Facebook and LinkedIn.

Schedule meetings

Cut the time-consuming email tennis and make it much easier for your leads to find a time to get in touch via a booking system on your website.

We added an automated calendar to the Bizink website and noticed a 30% uplift in the number of sales meetings

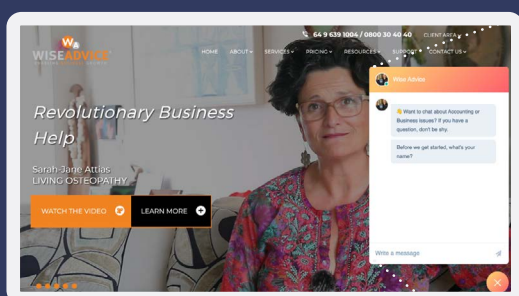
booked, and saved around 10 minutes of administrative time trying to schedule each of those meetings. This system sits as an interface on your website, but



can be set up to communicate directly with your calendar, video conferencing systems (for example Zoom), your CRM or task management systems, and even payment systems (for example, if you charge for meetings). Popular options include Acuity Scheduling, Calendly and Office 365.

Add a chatbot

Chatbots, or 'digital employees' as they are sometimes called, are rising in popularity. They allow your business to engage in conversations with your audience, in a way that instantly addresses their enquiry. You can set up automated responses to commonly asked questions, or you can simply provide options for finding out more information. Chatbots should be used to help direct enquiries, and not as a replacement for real human engagement. Platforms such as Drift, LiveAgent and Intercom provide easy-to-implement options, and some support apps, like Zendesk or Freshdesk, are also worth considering.

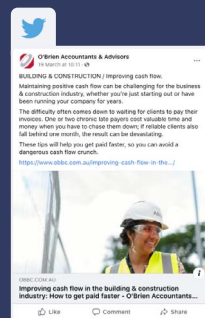
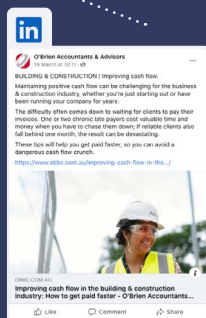
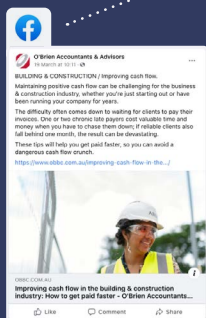
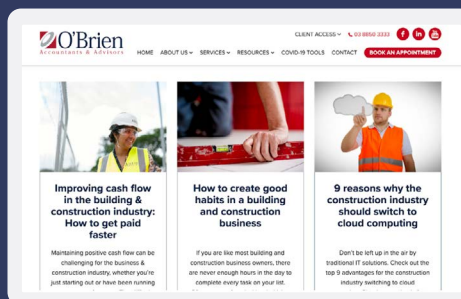


Ideas for automating your social media marketing

It's not surprising that one of the most common things holding businesses back from posting consistently on social media is time. With some simple automations, you can set up your social accounts to engage with your social community, even while you're not around.

Post once, share everywhere

Save time and create consistency across your social channels with the help of a centralised platform. You just upload your content in one place, select which channels you want to post to (and edit content for those platforms if needed), and schedule the day and time you'd like your content to post. While you'll still need to prepare the content, it can be more efficient to batch schedule content weeks in advance, so you can simply set and forget! Popular platforms for automated social posting include Sprout Social, Buffer and Hootsuite. Bizink provides an accountant-specific social media automation tool.



**Set up a social chatbot**

Much like the chatbot on your website, a Facebook Messenger chatbot allows visitors to get an instant response from your business on a pre-selected set of enquiries. Chatbots can also be set up to redirect visitors to a real person to further their conversation. It means that your potential leads can get answers to questions, even when you're not available to respond.

Post canned responses

Some social media automation platforms will enable you to set up suggested replies, making it easier and more efficient to respond to common questions or enquiries, and save you from typing out the same response each time.

Pulling it all together

Automating aspects of your marketing in isolation is a great place to get things started, but as you start to scale up and the complexity of your automation grows, it can be hard to juggle multiple, siloed platforms.

Ensuring that integrations and the seamless transfer of information happens can soon become a job in itself. It's likely that a single marketing automation platform might be better suited to what your business needs. While the upfront cost may seem high, when compared to the cost of multiple stand-alone platforms, it's probably worth it. After all, it also means only one interface to have to learn, and puts everything you need in one place. These platforms usually offer impressive functionality, but can also be scaled to suit what your business needs at the time.

If you want to create a completely streamlined marketing automation system, consider platforms like Hubspot, Active Campaign or Infusionsoft by Keap.

If you do find you need functionality that isn't quite covered well enough by a single platform, you can also use a tool like Zapier to connect apps that otherwise may not integrate seamlessly. For example, we use Zapier to push webinar registrants from a form on our website into Zoom webinars, and into our marketing software, Hubspot, so that we can email them. This can be done with any CRM (Customer Relationship Management) tool of your choice.

Wrapping Up

Marketing automation is all about putting your marketing assets to work, around the clock, even when you're not there to take care of enquiries. With automation, you become responsive to leads and able to deliver the right value, at the right time, to prospective clients.

With good content, automation transforms your website and email database into dynamic entities that are set up to support your business in growth – without you having to continuously process repetitive requests.

You know that good marketing takes consistency, so, instead of committing time you don't have to your efforts, let automation tools take care of the heavy lifting for you.

At Bizink, we make it easier for accountants and bookkeepers to grow their business, engage with their clients and save time through smart integrations.

If you want to find out more about how you can regularly and consistently share high-value content – already written for you – then book a free online demo with us!

We hope this guide has shown you the possibilities of marketing automation for accountants. Bizink's website and digital marketing platform has automation built in. Book some time with our team to find out more.

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