

# How to Win and Grow More CAS Relationships

September 23, 2023

*Charisma*

**botkeeper**  
The Future of Bookkeeping

# How to Win and Grow More CAS Relationships by Upleveling Your Marketing Approach



# Gaynor Meilke, MS, CBC, CTC

- Owner of Charisma Ink, LLC specializing in growth consulting, strategic business planning, and marketing for the accounting and technology market.
- 25+ years of experience serving accounting firms, tech vendors and fintech companies.
- Author and ghostwriter, builder of B2B thought leadership platforms.



*Charisma*  
**charismaink.com**

# Key Takeaways

1. Learn an efficient process to identify, attract and consultatively sell CAS to new prospects.
2. Remain and leverage being “top of mind” with prospects and existing by communicating the real value of your services using a variety of channels.
3. Learn how to efficiently create and deliver an effective, ongoing marketing and sales plan with specific tools and tactics to sell your firm’s CAS offering and differentiate you in the market.



# Poll #1

Do you currently have a  
CAS marketing system?

# STRATEGY BEATS TACTICS

# Steps to Win More CAS Clients By Year End

- Solidify client-facing positioning /USP
- Leverage niche opportunities
- Define actionable value proposition & packages
- Set goals & establish metrics for success
- Increase online and offline visibility
- Maximize Client-facing affiliations and referrals
- Communicate value and expand relationships




# Solidify Client-Facing Positioning/USP





# Solidify Client-Facing Positioning/USP



MORE THAN JUST BOOKKEEPING...

## We're Committed to Your Success

We go beyond crunching the numbers. Brigade offers dedicated support to help you set, track, and achieve your financial goals.

It's about holding you accountable and giving you the tools and strategies you need to grow and thrive.

With regular meetings and coaching sessions, clients gain a full understanding of what the numbers mean, what improvements can be made, and what the future looks like.

# Leverage Niche Opportunities

Specialization + Systematization = CA\$ Client\$

# Growing Your Firm with Targeted Niche Development

1. Focus on 1 to 3 niches
2. Develop the brand messaging/key messages/specific offering for each niche.
3. Use the website and social media as a hub for lead generation online with targeted funnels based on client journey for each niche.
5. Develop relationships with key niche-focused organizations and media to showcase expertise.
6. Track metrics: social growth, conversions, engagement with content, outreach



# Bridging Niche Strategy into Productized Services

Define what you do (area by area) when you work with a business from an outcomes perspective for each niche you focus on:

- Niche 1
- Niche 2
- Niche 3

# Poll #2

Have you packaged up your products to create a system?

# Bridging Niche Strategy into Productized Services for CAS Clients

## Niche 1: Salons

Bookkeeping  
Payroll  
Write up  
Financial reports  
Monthly meeting  
Add on 1:  
Add on 2

## Niche 2: Dental

Bookkeeping  
Payroll  
Write up  
Financial reports  
Monthly meeting  
Add on 1  
Add on 2:  
Add on 3: Advisory

## Niche 3: Non-Profits

Bookkeeping  
Payroll  
Write up  
Financial reports  
Monthly meeting  
Add on 1: Audit  
Add on 2: Forms  
Add on 3: Advisory

**Branding services is about packaging the actual services you want to deliver then adding the add ons to support each niche specialization.**



# Define an Actionable Value Proposition

**Marketing value to CAS Clients requires an outcomes perspective for each niche you focus on.**



# Set Goals & Establish Metrics for Success





# Increase Online and Offline Visibility





# STRATEGY BEATS TACTICS

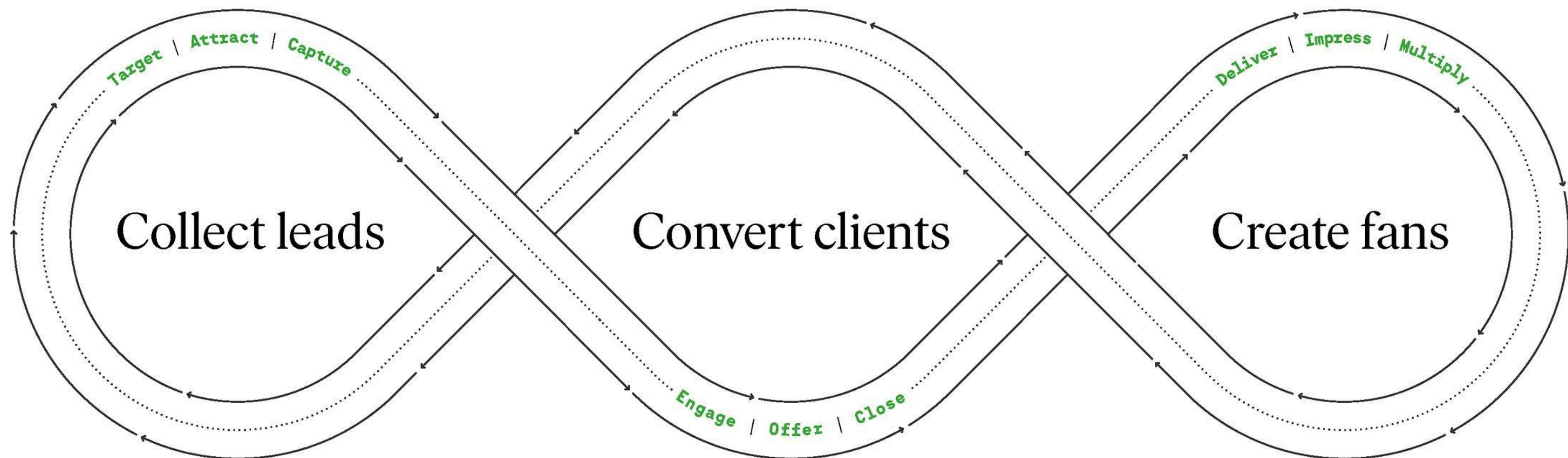
# THE CA\$ CUSTOMER JOURNEY BUILD SALES FUNNELS

# Poll #3

Are you actively adding  
more CAS clients this year?



# Lifecycle Marketing



## Target

Clearly define your target customer so you understand who they are, identify their pain, and where they go to find answers.



## Attract

Understand the problems and motivations of your target customer, so you can launch high-value content that addresses their biggest pains and aspirations.



## Capture

Now it's time to carefully build bulletproof lead capture methods so that you can collect contact information in one central place for later follow-up.



## Engage

This is where you get to educate your buyers. It's up to you to guide them properly so they look to you as someone they can trust. By doing it right, you can create a monopoly in their mind so that they immediately think of you when it is time to buy.



## Offer

Get clear on the most critical steps in your sales process and make sure it aligns with what your clients' needs are. As leads engage, present offers that lead them to the most natural next step.



## Close

Streamline a simple process for clients to purchase from your business by implementing tactics that align with your sales cycle.



## Deliver

Make sure you' systematize your delivery so that clients consistently get everything they were sold.



## Impress

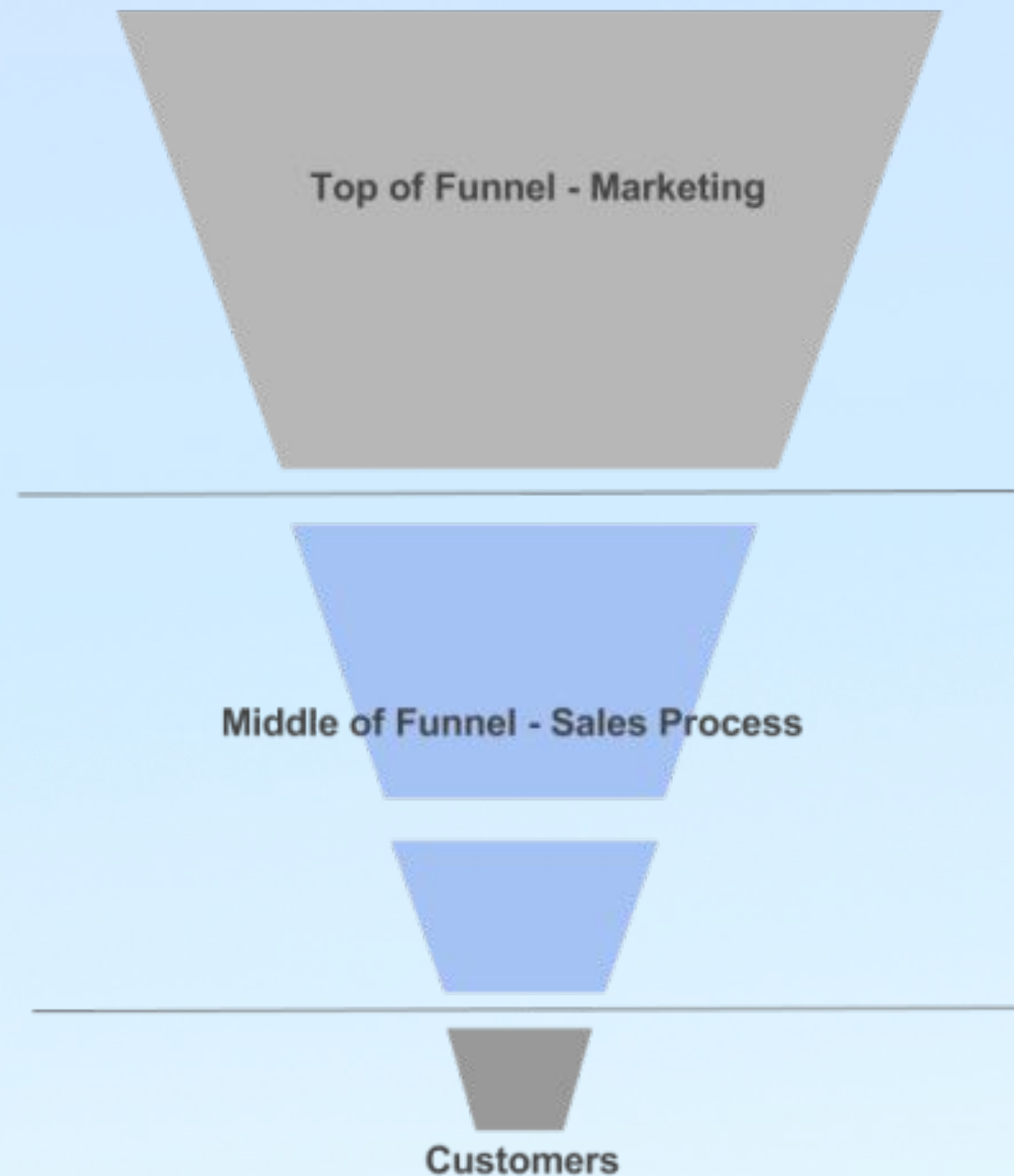
Create intentional plans to go above and beyond with every client. Leave a mark that keeps them coming back for more.



## Multiply

Guarantee repeat business, positive reviews, and customer referrals by making these steps part of your customer journey.

# Client Accounting Services Sales Funnel



# **Client Accounting Services**

## **Top of Funnel Action Items**

- **Google My Business Update**
- **Site update for branding, USP and niche specific content, niche pages and lead magnets, SEO.**
- **Social media Updates**
- **Client Referrals**
- **Prospect Lead Generation Emails (with a list or through partner associations)**



# Maximize Client-Facing Affiliations and Referrals

## Mid-Sales Funnel Action Items

- Prospect nurture emails with relevant content about services you provide.
- Follow up emails and invitations to proposals and firm education events.
- Social media introductions through LinkedIn

# Communicate Value and Expand Relationships

## Bottom of the Funnel Campaigns

### Prospect Nurture Social & Email Campaigns

- Celebrate your clients' wins on social media with video or posts.
- Welcome new clients on social media
- Monthly one email cyclical campaign for existing clients and one for prospects (start with one niche or do all three).
- This would be a maximum of four email campaigns total per month.

# Client Accounting Services

## Bottom of the Funnel Action Items

- In-person or virtual sales meeting with closure conversation tools.
- Pre-onboarding campaign sequences to welcome prospect into the firm until engagement is signed.
- Welcome package and how to work with our firm.
- Transition to existing clients nurture campaigns.



# Bottom of the Funnel Campaigns

## Prospect Nurture Social & Email Campaigns

- Celebrate your clients' wins on social media with video or posts.
- Welcome new clients on social media
- Monthly one email cyclical campaign for existing clients and one for prospects (start with one niche or do all three).
- This would be a maximum of four email campaigns total per month.

# CA\$ MARKETING CONTENT PLANNING

# Client Accounting Services

## Content Needs to Feed the Funnel

- Social content
- Videos for website, YouTube on a regular schedule
- Lead magnets - Downloadable content
- Email campaign content
- Sales presentation and scripting
- Prospect package - About our firm, services, USP, next steps
- Onboarding package and workflow

# CAS Marketing Communication Foundation

Initiative	Description	Delivery Method	List/ Audience	Notes
August				
Client Nurture Campaign				
Lead Generation Whitepaper				
Google Ads				
Facebook Ads				
LinkedIn/Facebook				
Sales Email for Target Audience				
September				
Client Nurture Campaign				
Lead Generation Whitepaper				
Google Ads				
Facebook Ads				
LinkedIn/Facebook				
Sales Email for Target Audience				
October				
Client Nurture Campaign				
Lead Generation Whitepaper				
Google Ads				
Facebook Ads				
LinkedIn/Facebook				
Sales Email for Target Audience				
November				
Client Nurture Campaign				
Lead Generation Whitepaper				
Google Ads				
Facebook Ads				
LinkedIn/Facebook				
Sales Email for Target Audience				



**Example:**

# **Top Searches for Bookkeeping, Accounting Services, Outsourced CFO SMBs**

- How are small businesses taxed?
- Bookkeeping software for small businesses.
- Part-time financial management for small businesses.
- How to reduce small business expenses.
- Small business cash flow issues

# Example: Top Searches for Bookkeeping Accounting Services, Outsourced CFO Dry Cleaners

- How to sell a dry cleaning business
- How to start a dry cleaning business
- Dry cleaning business cpa
- Dry cleaning business accounting
- Accounting software for dry cleaners

# Example: Top Search Queries for Bookkeeping, Accounting Services, Outsourced CFO Non-Profits

- What are the basics of accounting for non-profits?
- Does my non-profit need a controller for audits?
- How to file taxes for non-profits?
- When are 990s due?
- Top non-profit accountants in Miami

**POLL #4:**

**Which of the 7 steps are you going to implement first?**



# Advanced Sales & Marketing Strategies

- Presentations/thought leadership niche-directed collaboration with targeted groups
- Referral/text campaigns
- Partner programs/alliances with vendors
- Employer/employee branding
- Google niche-targeted ads and retargeting ads

# Poll #5

What is your interest level in marketing your CAS services?



# Converting CA\$ Leads to Sales

1

Share with me, what is going through your mind as you think about <issue>?

Share with me, what is going through your mind as you think about your business accounting?

Share with me, what is going through your mind as you think specifically about how you are handling your back office right now?

Share with me, what is going through your mind as you think about the outcomes you would like to have by working with our firm?

Share with me, what is going through your mind as you think about how much freedom we can offer you by alleviating this burden?



Consultative CAS Conversations  
[charismaink.com](http://charismaink.com)

## TURN CAS TO CA\$H

7 Steps to Consultative CAS Conversations



2

What were some of your original ideas about how to fix/prepare for <issue>?... What results were you expecting?

What were some of your original ideas about how to address your accounting needs?

...Are you expecting to have more time?

How did you determine your current accounting model is not working?

...Were you expecting to have more accurate and timely books?

What were some of your original ideas about how to alleviate the burden of accounting and bookkeeping?

...What results were you expecting?

What were some of your original ideas about alternative accounting services can employ here?

...What results were you expecting?



Consultative CAS Conversations  
[charismaink.com](http://charismaink.com)







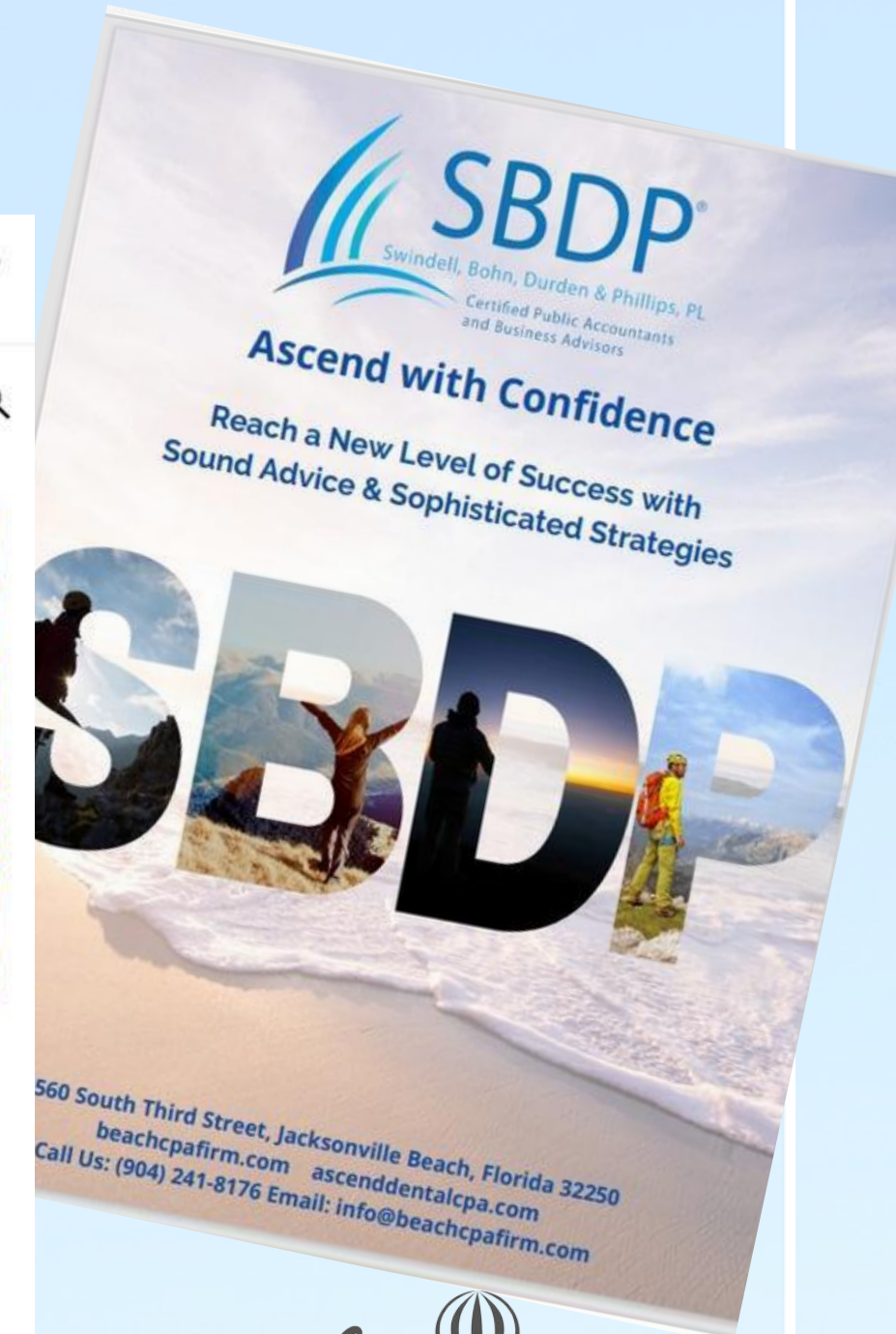
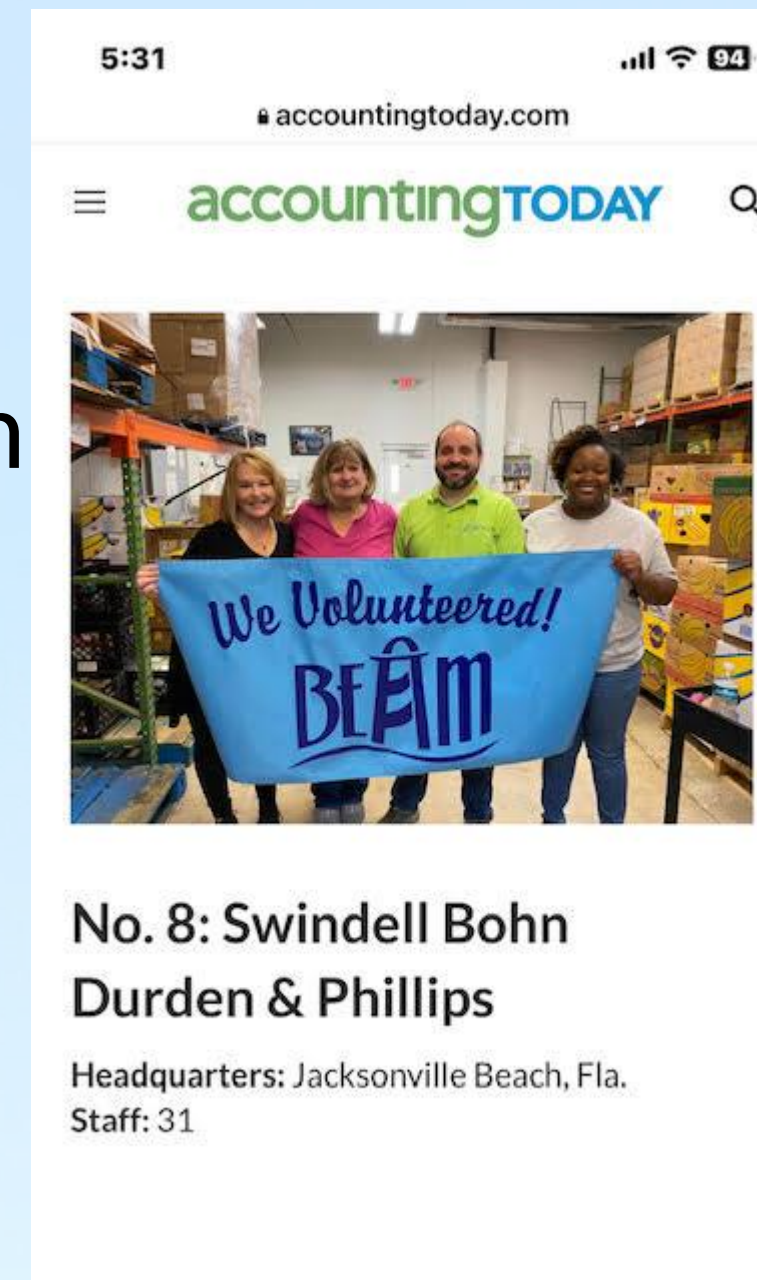
*Charisma*

**CA\$ to CA\$H**  
**Success Stories**



# SBDP Thriving Referral Network & Lead Generation

- Established dental and business advisory niches
- 5 full service accounting clients/month
- Dental practices 2-3 month or more
- Employer branding & social growth





[Service](#)[Industries](#)[Blog](#)[Contact](#)

SIMPLIFY BUDGETING

## Take Control of Your Non-Profit Spend Management

with Help from Consultance Accounting

Take control of your non-profit spending with a strong and strategic management system. Learn how Consultance Accounting can help you cash flow confidence.

Download the guide below.



FIRST NAME\*

LAST NAME\*

EMAIL\*

ORGANIZATION NAME

ORGANIZATION URL

How Can We Help?

Please Select

protected by reCAPTCHA  
Privacy Policy



SEND

Gaynor Meilke

E: Gaynor@charismaink.com

LinkedIn: [\(11\) Gaynor Hardy \(Meilke\), MS, CBC, CTC, CTRSP-E | LinkedIn](#)

# THANK YOU!

---