

PREVIEW COPY

The Marketing Machine[®]

for

Small Business Accountants

Systematic and measurable referral marketing programs

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PREFACE

You may be wondering if this is just another general marketing and sales work.

We can assure you it's not!

We have a very specific point of view which you will soon recognize. It's based on years of marketing experience and on the marketing problems our CPA friends have faced, and continue to face.

To understand why we wrote it, it helps to know where we've been.

After over 30 years of consulting to major national and international companies on their marketing challenges, and bringing home for them more than \$4.5 billion in sales (last measured in 2001), along with literally hundreds of awards for results, we found our focus deliberately turning toward the challenges of smaller businesses. We think small-to-medium sized businesses represent the real engine of our economy.

Of course, SMBs don't have the five-digit budgets we enjoyed working with! But in those decades of spectacular experiments and award-winning results, we gained unique and remarkable experience. Now we have the chance of making a material difference in the future of SMB owners, their employees and yes, in the quality of products and services provided to their clients and customers.

Within the SMB community, CPAs are one of the prime resources -- particularly to the middle market.

However, the independent CPA firm faces some distinct marketing challenges – not just because of developments in the industry, but because of the nature of what it means to be an accountant.

We see those challenges resulting from:

- your personality and the nature of your professional skills
- your expectations and the expectation of potential clients
- your likely lack of formal training in sophisticated marketing strategies

Here's the perfect example of how a disconnect manifests itself.

While you provide sophisticated financial counseling to small business executives, they lack even threshold understanding of the numbers. All too often, they mask their inadequacies with glib references to their financial counselors as “bean counters.”

(Frankly, even though this is floated as “good-natured humor,” we find it disrespectful and demeaning. Perhaps more poignant, for us it is also motivating!)

As a result of these baked-in challenges, a great many otherwise highly capable CPAs remain largely – or even totally – unaware of effective ways to confront even ordinary marketing obstacles. We identify several of them in Chapter One!

We wrote this book to help CPAs get around or over those obstacles so they can get on with doing more of the important work they have trained to do. It’s as simple as that!

Joseph Krueger & Virginia Nicols

*About the **Business Marketing Series***

When we sat down to write *The Marketing Machine® for Professional Services* we envisioned it as a general guide to businesses serving the Small-to-Medium-sized Business (SMB) community. The book features advertising, marketing and sales strategies and techniques that we have employed over the years with considerable success – and ROI --for major as well as boutique organizations.

In large part, those successes, and the examples in the book, come from the world of Direct Marketing.

As we were writing, it became clear that we had more information and examples to share that **applied to specific professions or industries**. We were frustrated that we couldn’t include them all!

Thus the first book became the impetus for an entire series. As of this 2019 update, we now have three basic volumes, accompanied in each case with a workbook. (Reading is one way to learn. Writing adds a whole other perspective!)

The
Business Marketing
Series
from
The Marketing
Machine®

Each book in the series is written for the small business professional. The companion workbook follows the same flow, breaking it up into questions so that you can easily customize the content for your own business.

We've created **specific books and workbooks for Accountants and Attorneys** who work with small business clients.



While each book focuses on a specific profession or industry, there are many similarities between basic concepts and recommendations. As a result, you may see some selective and purposeful duplication of material from one book to another. After all, marketing and sales basics are precisely that – basics that apply across the board.

But in each volume, **many of our personal comments, our cautions and even whole discussions of “marketing psychology” come from experience** we’ve had with your specific profession.

We trust you will recognize those specifics. And we hope you’ll be able to turn them to personal advantage as you build your own successful business.

INTRODUCTION

This is a book about marketing your professional practice. What can you expect from it?

First, be warned that *The Marketing Machine*[®] for Small Business Accountants is not an all-encompassing book on marketing and selling.

We struggled with the temptation to create a more thorough work, but we came to the conclusion that too much detail for too wide an audience would run the risk of being off target for some readers.

We decided to concentrate exclusively on **marketing for Professional Accountants and CPA firms that serve small-to-medium size businesses (SMBs).**

While some of our professional readers may work with individual owners and executives of client companies, we are completely focused on **strategies, tactics and programs that target businesses as clients.**

We've also narrowed the focus of this book because in today's intensely competitive and hectic business environment, thick volumes simply don't get read by busy people.

Our target audience is mostly working professionals who can benefit by abandoning activities that don't work for them. They deserve to find and employ marketing efforts that fit their existing skillset and produce what they consider ideal clients.

Moreover, we chose the accounting and legal professions for our series for specific reasons.

- To begin with, both accounting and legal services are critical to the success of SMBs -- but the full range of skillsets of both accountants and attorneys are typically underutilized and misunderstood by entrepreneurs and small business executives.
- More specifically, the nature of most CPAs we know and have dealt with is conservative . . . almost the exact opposite of the "sales personality." It's not surprising that these conservative business people lack familiarity with the sophisticated sales and marketing techniques available to them.
- Put conservative CPAs together with task-oriented (read "driven") SMB owners who don't fully understand the financial aspects of even their own businesses – and you have a problem!

These realities often give rise to misplaced confidence in traditional advertising and sales “schemes” – efforts that fail to produce the desired outcome, waste money and discourage additional activity.

These are precisely the challenges we address and present solutions to.

If you recognize yourself in any of the situations described so far, it is our sincere hope that this book will change the marketing dynamic for your practice.

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You've reached the end of this preview. These introductory pages should give you a good understanding of what drives our approach to marketing for professionals – a no-nonsense, disciplined focus on *what will work for your practice*, given your personal strengths and ambitions.

[Click here](#) to get your copy of the book at Amazon. Take a look at the companion WORKBOOK, too.