



# Building your accounting firm's marketing plan (Workshop)

Carla Caldwell  
Caldwell Consulting & Training LLC



A photograph of two young women with blonde hair, seen from the chest up, engaged in conversation outdoors at night. The woman on the left is in profile, looking towards the right, wearing a dark jacket with a light-colored fur collar. The woman on the right is seen from the back, looking towards the left. The background is dark and out of focus, showing some green foliage. The text "Take a minute to connect with your neighbor" is overlaid in white on the right side of the image.

Take a minute  
to connect with  
your neighbor

#QBConnect | WiFi: QBConnect

# CPE Process

## In order to receive CPE credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **2 hours of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

# Today's speaker



Carla Caldwell

Founder/CEO

Caldwell Consulting & Training LLC

@Carla\_Caldwell

# Agenda

Welcome

Marketing plan defined

Overview of the workshop

Workshop

Wrap-up / Sharing



**The time spent developing your marketing plan is time well spent, because it defines how you connect with your customers.**

US Small Business Administration



# What is the purpose of marketing?

“To move prospects and customers through the value journey to become long-time customers and raving fans.”

~ Ryan Deiss, Digital Marketer



# What is a marketing plan?

**A plan that describes activities involved in achieving specific market objectives within a set timeframe. This includes:**

Identification of customer needs

Analysis of current market situation

Detailed action programs

Budgets

Forecasts

Strategies

Source: [BusinessDictionary.com](https://www.businessdictionary.com)



# Workshop

Assess current state

State firm mission

Define marketing goals

Identify target market

Select methods

Create budget

State what's missing



# Assess current state

What's working today? What have you already done?

## Brand

Logo

Identity as a Firm

Website

## Content

Blogs / Newsletters

Twitter

Other Social Media

## Target Market

Ideal Client (to niche or not to niche)

Service Offering

Pricing

## Activities

Trade Shows

Webinars / Seminars

Referral Program

10 Minutes

# State firm mission

Purpose – why your firm exists

Vision – the difference you'll create in your customers' lives

Mission – an achievable position in the market

Values – principles that guide your decisions



5 Minutes

# Define marketing goals

Adding new clients?

Moving into new market?

Selling the firm?

**S**pecific

**M**easurable

**A**ttainable

**R**ealistic

**T**imely

10 Minutes

# Identify target market

## Ideal Clients:

Individual or business

New or existing clients

Size

Industry

Geography

Demographics

## Pain Points

Complexity

Growth stage

Urgency

Legal / regulatory issue

10 Minutes

# Select methods

Online presence

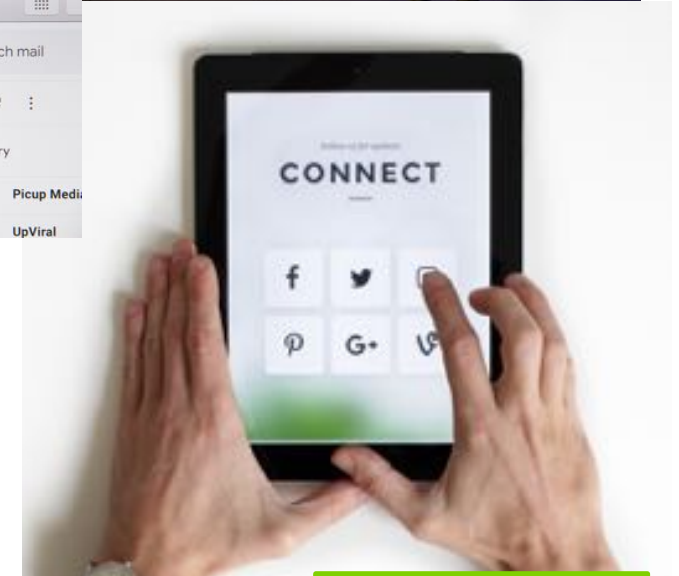
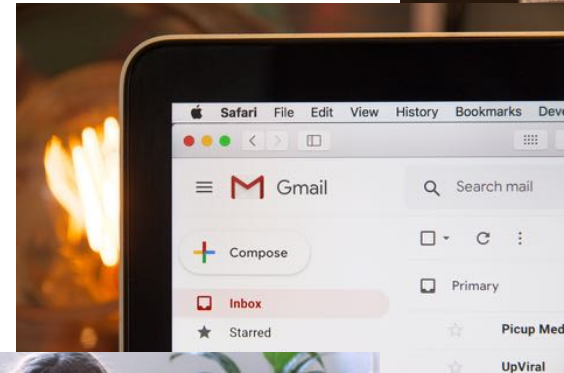
Networking events

Social media campaigns

Industry trade shows

Email / newsletters

Referral program



5 Minutes



# Create budget

## Considerations:

In-house staff or Out-source

## Services Needed:

- Content creation
- Social media
- Web design
- Branding
- Ad campaigns



5 Minutes

# State what's missing

What additional Information do you need?

What additional resources do you need?

What are the priorities?

How soon can you get started?

10 Minutes



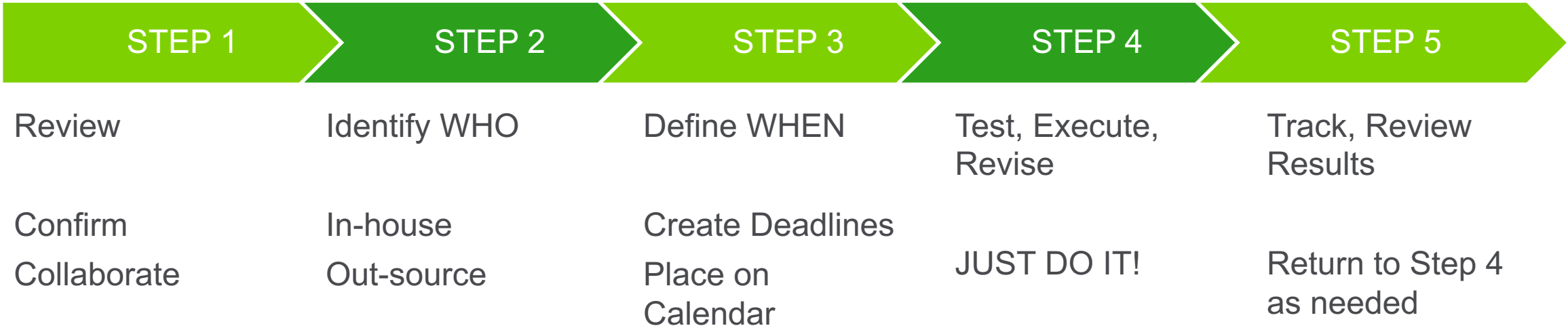


**The way to get started is to quit talking  
and begin doing.**

Walt Disney



# Next steps



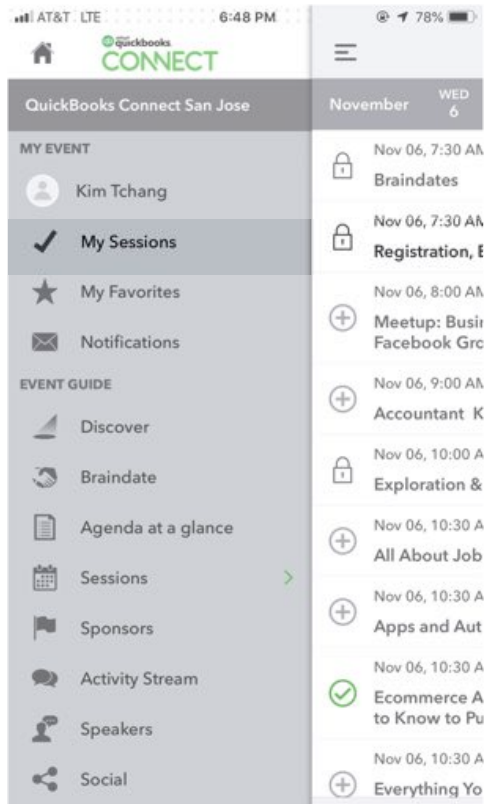


# Time to share!

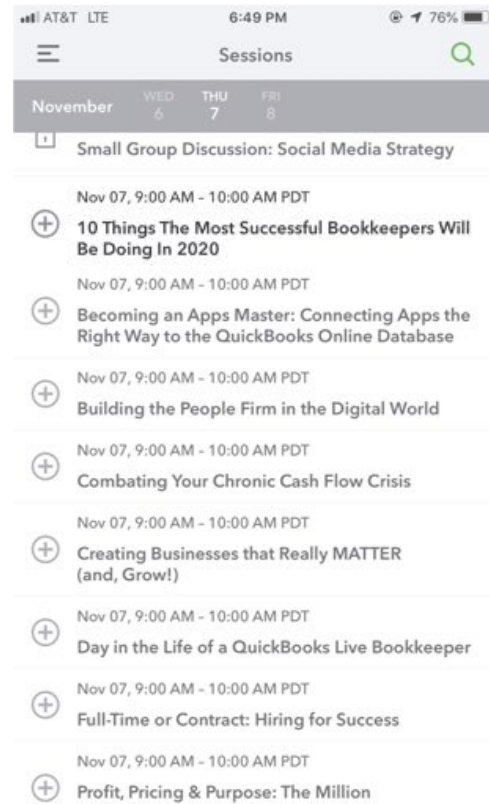
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Provide feedback to help us design content for future events

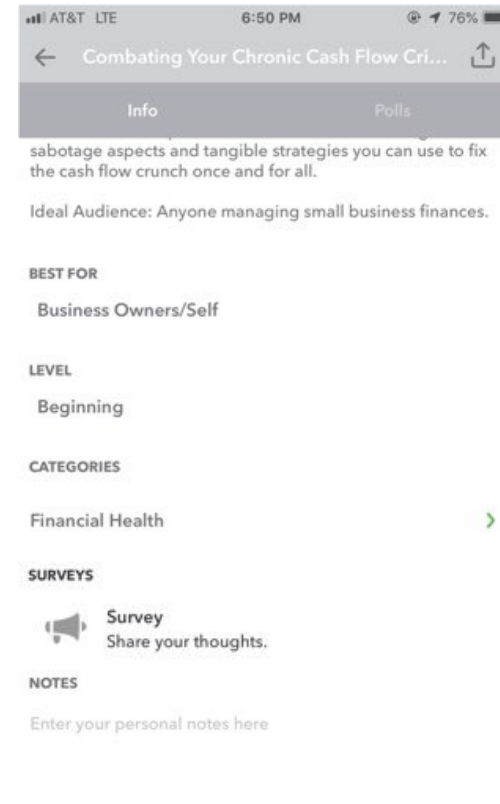
## 1. Select Sessions



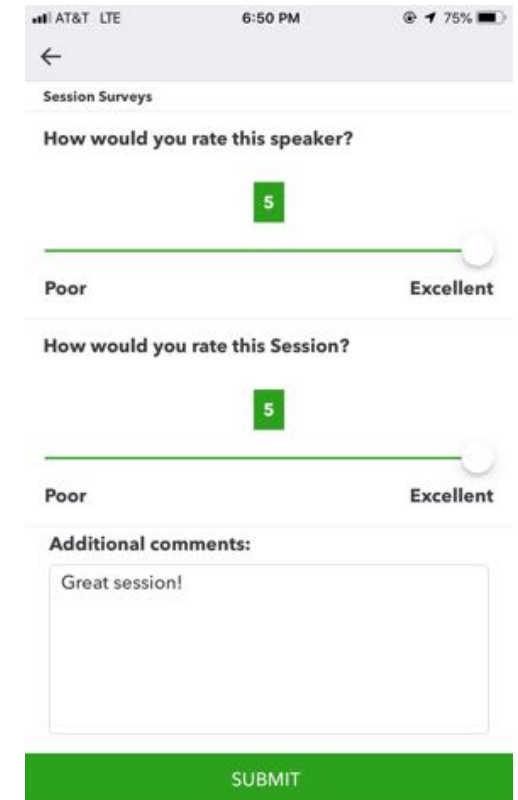
## 2. Select Session Title



## 3. Select Survey



## 4. Add Ratings



# Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. The date 'November 7' is highlighted, with 'November 6: Accountant Day' and 'November 8' also visible. A 'Print Agenda' link is in the top right. Below the header, a paragraph describes the event: 'Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.' A search bar labeled 'Search for sessions' is present. Below the search bar, filters are listed: Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health, with an 'Expand all +' link. The agenda list shows sessions for November 7. The first session is 'Registration, Breakfast & Exploration' from 7:30-7:00 am. The second is 'Braindates' from 7:30-10:30 am, described as a new feature for booking time with attendees, consultants, and support. The third is 'Yoga' from 8:00-8:30 am. The fourth is 'Breakout Sessions' from 8:00-8:45 am, which includes several small group discussions: 'Small Business Meetup: Relationship Marketing and the Power of Human Connection', 'Small Group Discussion: Social Media Strategy', 'Small Group Discussion: Showing up - Why What You Wear Matters', and 'Small Group Discussion: Build Your Dream Bookkeeping firm'. Each session has a '+' icon to its right for more information.

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November 6: Accountant Day November 7 November 8

Print Agenda

Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.

Search for sessions

Filters: Business Growth Life & Business Skills Organizational Culture Technology Training Advisory Financial Health Expand all +

7:30-7:00 am Registration, Breakfast & Exploration

7:30-10:30 am Braindates  
New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more](#)  
Best for: All Audiences  
CPE Hours: not eligible

8:00-8:30 am Yoga

8:00-8:45 am Breakout Sessions

Small Business Meetup: Relationship Marketing and the Power of Human Connection

Small Group Discussion: Social Media Strategy

Small Group Discussion: Showing up - Why What You Wear Matters

Small Group Discussion: Build Your Dream Bookkeeping firm



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