

How To Communicate the True Brand Value Of Your CAS Firm

Differentiate, Develop, Disseminate





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 of *The Market Ownership Method*, *The Bank Your Brain Blueprint*, and *Avoiding App-athy in the Accounting Channel*.



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Key Takeaways

1. An actionable framework for building and differentiating your CAS firm's brand
2. Checklist items for 30, 60, and 90 days of your firm branding and marketing launch.
3. Executing on your plan's content strategy (without spending your life /life savings doing it).



Define Your CAS Firm Brand



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Step 1:
**Define the Intended Outcomes
of Your Firm's Existence.**

**What do you and your
clients want to achieve?**



Who is Your Ideal Client?

- **Personas (Ideal Client Profile)**
- **What problem do you solve for them?**
- **Where do they look for information about the solution you can offer?**

Brand Definition:

- One page marketing plan.
- Answer these questions:
 - What problem you solve.
 - Who you solve it for.
 - Why they would buy from you instead of someone else.
 - When you are going to deploy your campaigns/communications.
 - How you will deploy them (which channels and using what media assets?).

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Develop Your CAS Content Messaging



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Step 2:
Develop your messaging.

**Communicate that your firm is
the antidote to your ICP's pain.**

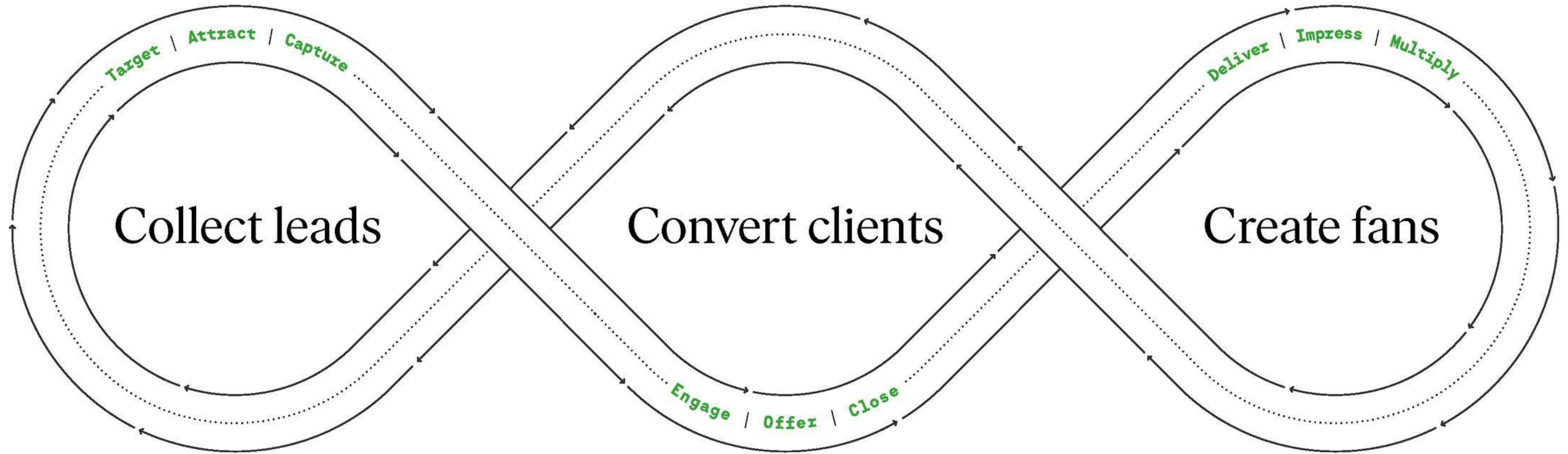


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**Take your prospective clients on a journey
to solve their problems, NOT yours!**

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.

Hub-Spoke-Spiderweb Model

Get inside of your ICP's head and understand what problems they seek to solve.

1. Hub - Cash flow issues for law firms.
2. Spokes - a) spend management b) invoicing
3. Spiderweb -
 - a. stories of success
 - b. spend management systems
 - c. how you can implement spend controls in a law firm
 - d. strategies for getting invoices paid faster.



Create an ongoing content strategy that fits your chosen channels.

1. Make an annual calendar, month by month with each channel you are going to use and the content you are going to put in it.
2. Use the hub-spoke-spider web model.
3. Consistency and relevancy is more important than volume.
4. Top content channels for B2B: LinkedIn, YouTube, blogs, website, email, reciprocal sites, presentations.



Content Feeds the Funnel

- Social content - LinkedIn InMail, Articles, Video
- Videos for website, YouTube on a regular schedule - thought leadership and how-to
- Lead magnets - Downloadable content
- Email campaign content
- Sales presentations and scripting
- Prospect package - About our firm, services, USP, next steps
- Onboarding package and workflow



Always: Choose Your Most Engaged Channels

**Create content that resonates
and reaches your prospects.**



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Disseminate Your CAS Brand & Content



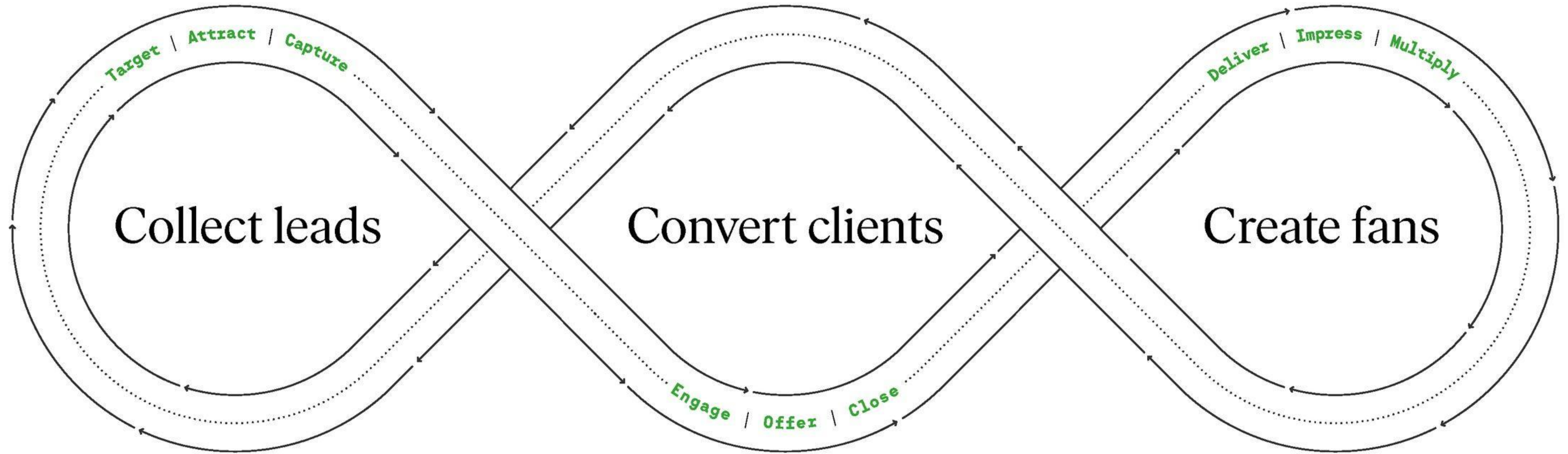
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Disseminate
Target Marketing & Referral Networking

**How and where can
you reach your ICPs?**



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Firm 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				

Social Proof Marketing Matters
Share Your Successes
for More Success



Social proof sells!

- Show how you have solved the problem for your ideal clients to attract more of them.
- Share your success and your clients' success shamelessly!

Launch Your CAS Firm Brand Marketing Plan

A 30-60-90 Day Marketing Launch List



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Action Items Day 30 to 60:

- Get your domain
- Set up a website
- Brand development
- SEO
- Email provider and lists
- Referral sources - friends and family and colleagues
- Social media set up - LinkedIn, Twitter, You Tube



Action Items Day 31 to 60

- Set up a blog and start blogging (1 - 2 times per week)
- Look for opportunities to speak/do webinars/share content
- Lead magnets and automation
- Referral meetings
- Online and in-person networking
- Client onboarding and offboarding experience



Action Items Day 61 to 90

- Get reviews from former clients.
- Write and share case studies.
- Email automation campaigns for onboarding & offboarding
- Email automation
- Lead magnets
- Drip campaigns
- Client referrals


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Advanced Sales & Marketing Strategies

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

Always: Measure & Evaluate

**Do more of what works
and drop what doesn't.**



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KPI

Set Goals & Establish Metrics for Success

**Thank you &
Here's to Your Success!**

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