



# Lead Generation for Accountants: Mastering Digital Marketing

A Capium whitepaper for accountants.





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# Foreword

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Accountants wanting to generate more leads and win more business is nothing new. Now more than ever, though, we're hearing from people who are more interested in generating the right leads than generating lots of leads – but aren't sure how to go about doing that.

Staying ahead of the curve means working smarter: attracting and working with your ideal clients and doing the type of work that's most efficient, profitable, and enjoyable. But getting there can be easier said than done.

One of the hardest things to do as a small business owner is create the space you need to step back, work out exactly what your goals are and assess your unique selling points. Getting that objectivity can be difficult – but it's critical to position yourself appropriately and put yourself in front of your target audience.

We know that lots of accountants feel like their lead generation efforts are fruitless, because they're hard to measure. How do you know which of the tactics you're trying is the most effective? How much money should you spend? And sometimes, where do you even start?

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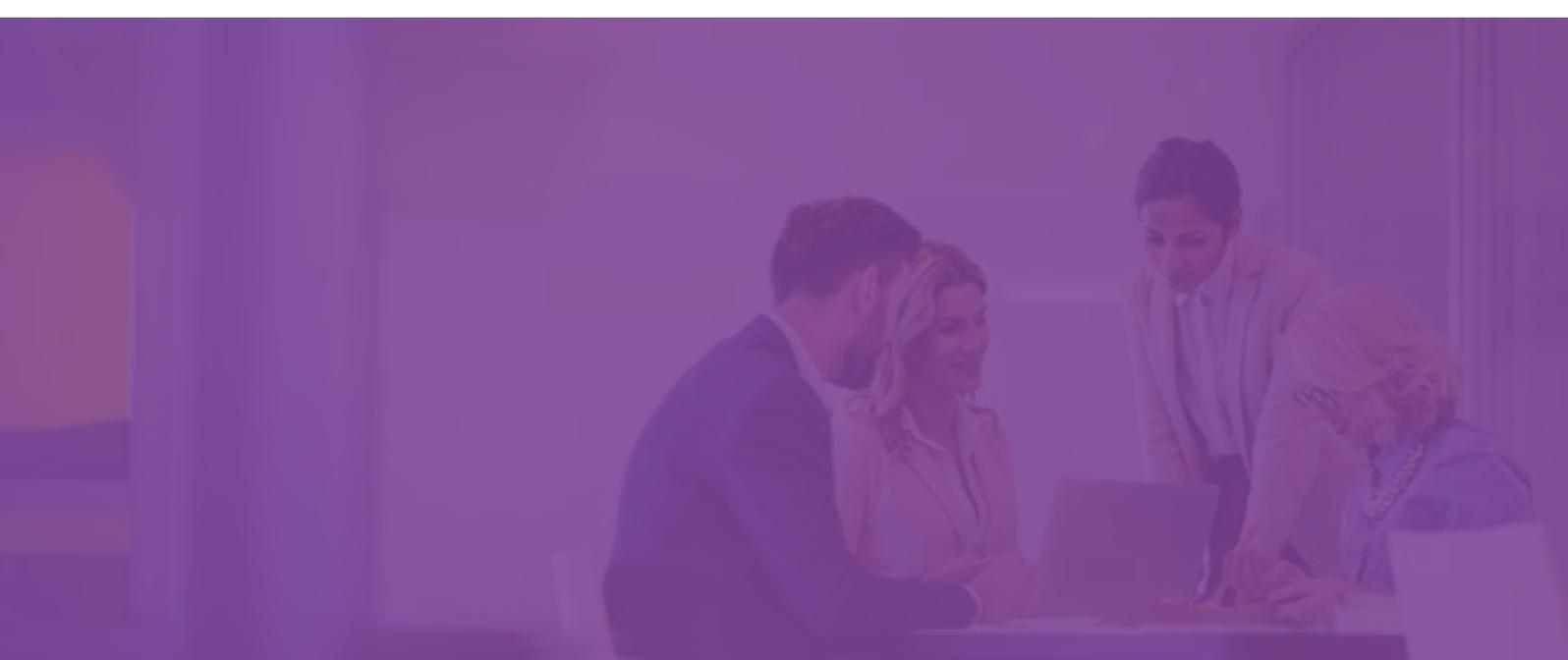
At Capium, we've always set out to take the hard work, leg work, and guesswork out of running an accountancy firm. That's why we've put together this quick guide to look at how to generate leads for your accounting firm – starting with some simple steps to help you identify who you're trying to attract, what work you love doing, and how to measure what's working and what's not.



**Tushir Patel**  
co-founder of Capium

## About us

Capium is the pioneer of cloud-connected accounting software for owners of small and medium-sized accountancy practices. Our software suite marries automated accounts production and powerful practice management tools specifically designed to help accountants in practice run a smarter, more efficient, and ultimately more profitable business.





# Understanding your target audience

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For any small business, the temptation to jump straight into putting together and executing a tactical marketing plan can be all too great. You're not sure where to start or what good looks like, but you know you should be doing something.

That's where lots of accountants go wrong.

Just because your competitors are advertising on Facebook, for example, doesn't mean that's the right lead generation strategy for you. Similarly, even though it might feel like everyone else is sending out newsletters each week with dates and reminders, if that's not the sort of communication your target clients value, you're at risk of turning them off.

Understanding who you're trying to reach is the absolute cornerstone of any lead generation strategy or marketing activity. If you want to see a real return on investment, it's a step you can't skip.

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## Who do you want to target?

The first thing to do is to take a step back and ask yourselves – who do we really want to target? Then, dig deeper into what those types of clients look like. Maybe they're clients that you work with regularly already, or maybe it's a brand new type of customer.

Try to articulate, as specifically as you can:

- What sort of job titles do they have?
- What size company are they?
- Do they have employees?
- What sector are they in?

Once you've thought about those points carefully, the next question to ask is: why do I want to work with them?

If you've identified FinTech startups, for instance, as your target audience, is it because you enjoy working with clients who have strong growth ambitions? Do you like the challenge of rapidly changing and dynamic business models? Or is it because you've got a keen interest in the sector yourself, and are curious about what's happening next?

Alternatively, if you've worked out that SMEs in the construction industry are your real gold-star clients, is it because you've got the specialist knowledge to charge out services at higher rates? Are these types of clients the most profitable to you as a business?

Or maybe you're after clients who could really benefit from an in-house finance professional but can't afford to hire one. Do you want to be the one-stop shop for outsourcing payroll, bookkeeping, and tax planning?

Whatever your reasoning, it's important to understand exactly why you're trying to attract the clients you're hoping to work with.

Without that knowledge, it's almost impossible to answer the next big question: why should they work with me?

## How to understand and sell your USPs

You've worked out who your target audience is, and you know why you want to work with them. It's time to turn that into a set of unique selling points (USPs) that clearly articulate why your dream clients should work with you, and nobody else.

Remember, in 2022, clients have more choice than ever about which accountants to use – because they're not restricted by geography and location. Digital interaction is becoming the norm, so it's important to make your USPs really stand out and feel relevant to your target audience if you want to steal a march on your competitors.

What problem are you solving?

When it comes to identifying USPs, lots of accountants start with a similar set of questions: what makes us different from the others? How are we special? What do we do that nobody else can offer?

While those are all important things to understand internally, the problem is that the answers you end up with can be entirely subjective. They're also often hard to quantify and, ultimately, can end up making you sound the same as the accountant down the road (or the firm that ranks next to you on Google).

So, rather than thinking about what you're really good at, try flipping the narrative.

Ask yourself: what problems am I trying to solve for my clients?

Most businesses that hire accountants have similar reasons for doing so – they either lack the time, knowledge, or willingness to carry out the functions that accountants typically perform.

Think about which one of those three factors is the real pain point for your target audience, and then map across how your services can help solve them.

If you're targeting owner-led start-ups, for example, you can be pretty sure that they're time-poor – and would rather not spend hours poring over their books when they could be focusing on running their business.

So, if they come across your website and find an accountant that promises to save them time, give them the freedom to get back to what's important, and handle all the numbers so that they never have to look at a receipt again? Bingo.

That's much more likely to resonate than a sentence or two about how you've got an expert team of bookkeeping professionals with 10 years of experience in the industry, right?

By taking this approach, you can be confident that you'll end up with a truly value-driven proposition that means something to your clients and that your whole business can believe in.

## The lead generation process

Once you've got a clear idea of who you're going after, and how what you do can help them to solve a genuine business problem, it's time to start thinking about getting in front of and attracting more of this type of client.

This process is usually referred to as lead generation – and it's often the ultimate aim of any targeted marketing campaign or overarching business strategy.

### Using a common language

Before you start trying to generate leads, it's important to make sure everyone in your business is on the same page about what that actually means. Lots of businesses use different terminology to describe what is essentially the same thing – 'leads', 'opportunities' and 'prospects' all refer to potential clients.

Here's an explanation of some of the common terminology that might help:

- **Leads**

A lead is someone who reaches out to you directly – whether through your website, phone, or in person. At this point, you might have some information about them, like an email address or an inquiry form, but not enough to work out if they fit the target audience you've identified. It's important to speak to all leads to see if they're the kind of business you're after.

- **Prospects**

A prospect is what a lead becomes once you've 'qualified' them and assessed that they're the right type of client for you. Once you've spoken to them, you'll have an understanding of who they are (and whether they fit your target client market), what their problem is, and, most importantly, how you can help them.

- **Lead nurturing and the marketing funnel**

There are several stages to the lead generation process, and there can be lots of touchpoints, too – whether that’s directly with you, your content or marketing activity, or a sales team.

Nurturing leads means using a range of marketing tools and activities to move people closer to becoming a fully-fledged client, and is sometimes referred to as adding prospects to, or moving leads through, the ‘marketing funnel.’

The marketing funnel is a concept that recognises that, at each stage of your marketing activity, leads naturally drop off. When people start shopping for something, they typically go through a buyer journey that includes browsing, researching, looking at other options, and, frequently, changing their minds.

Your potential accounting clients are no different.

## Key stages of a buyer journey

- Awareness – they might be loosely aware that they need an accountant, triggered by a problem that they’re having or an idea to change the way they do things.
- Consideration – they’ll start thinking about the different ways they might fix their problem (like hiring an accountant) and considering the best options for them. They’ll be researching and comparing options.
- Purchase – they’ll be ready to choose a specific solution at this point, ideally yours!

It’s natural for people to drop off during this journey – that’s just part of marketing.

Where the clever stuff comes in is understanding what your target audience is thinking and feeling at the different stages of the marketing funnel, and tailoring your activity and messaging to suit.

# Getting tactical: lead generation in action

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At this point, you've put in the leg work to understand who you're targeting, how you can solve their problems, and what the lead generation process looks like in theory.

Now it's time for the exciting bit: you're ready to start thinking tactics.

The term tactics or 'tactical marketing' refers to the way in which you go about executing a marketing or lead generation strategy. Your overarching goal, for example, might be to generate 10 qualified leads in the next quarter. Your tactics set out exactly how you're going to do that.

## Your website

There's no getting away from the fact that your website is the absolute cornerstone of any marketing activity you undertake. It's the foundation you need to get everything right.

Gone are the days when a website served simply as a 'shop window'.

Now, it's the piece of the puzzle that joins all your marketing activities together. It tells people who you are, what you're about, and how they can get in touch with you. It showcases work you've done, other clients you've helped, and the way you go about your business.

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It's also the landing point for any other marketing activity you're conducting. If you're experimenting with advertising or social media, for example, you'll want people to click through to your site to find out more about you. And, if you're referred by one client to another through word of mouth, chances are, the first thing they'll do is google you.

With that in mind, it's critical that your website stands up to scrutiny – and is set up to guide leads through that marketing funnel, rather than put them off with bad design or poor content before they even find out who you really are.

Here are some top tips to make sure your website's working hard:

- Make it easy for people to get in touch with you – have your contact information visible, include forms and links to email or call you.
- Spell out your value proposition clearly and lead with the audience you're trying to attract. Remember, you can't be all things to all people. Prioritise the clients you've identified as gold-standard, and speak to them.
- Offer high-value content that visitors can download in exchange for their contact details. Make sure you get permission to add them to your mailing lists, and send them useful information as a follow-up.
- Bring your client success stories to life – showcase how you've made businesses just like them successful.

## Other marketing tactics

Once you're confident that your website is up to scratch, you can consider a range of other marketing tactics to help generate leads. Depending on your target audience and where you think they're most active, you might want to consider using a range of the below.

### Search Engine Optimisation (SEO)

This is where you focus on optimising your website and content to encourage Google to rank you more highly in search results. Generally, the higher you rank in search results, the more likely you are to get leads. That's partly down to convenience (nobody wants to scroll), but it's also a sign of confidence: clients know that a high-ranking page usually means a trustworthy company.

### Pay per click (PPC)

PPC is where you advertise on a search engine and pay every time somebody clicks on your advert. The more relevant your advert is to what your audience is searching for, the better chance you've got of converting a lead.

### Content marketing

Content marketing is a really powerful tool. It's great for SEO, as you can focus it around certain keywords that you know people are interested in. It's also your chance to prove to your target audience that you really understand them and are committed to answering their questions. Even writing one short, useful blog a month can help.

### Social media

Most companies have some sort of presence on social media, and it's up to you to decide how relevant it is for your accounting practice. If you work with start-ups that are active on Instagram, for example, it could be a great place for you to interact with them. Remember, though, that dormant or inactive social media profiles are worse than not having one at all – giving the impression that you're not on top of things, or don't have anything to say.



# Measuring what's working

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Once you know how you're going to reach your target clients, it's really important to record and track your progress so that you can adapt your activity along the way.

If you're just starting out, it's wise to dip a toe into several marketing channels, rather than put all your eggs in one basket. But if you're taking that approach (often referred to as 'test and learn'), you'll need to make sure you can attribute success to each specific type of activity.

## The importance of a CRM

One of the best ways to track leads all the way through the buyer journey is to invest in a customer relationship management system, known as a CRM, or a practice management system with CRM features.

As well as holding key data, contact details, and acting as a single point of truth, a CRM helps you to review trends and patterns in a meaningful way. You'll be able to see where your leads came from, what they did next and, ultimately, how much money they've spent with you so far.

## Google Analytics

The other powerful tool that you need in your arsenal is to set up and monitor your Google Analytics account. It's where you can see who's visited your site, what pages they looked at, where they came from (eg did they search for your name, or did they

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click on a link via social media?), and any actions they took next.

You can use Google Analytics to review changes in traffic to your website and then overlay your marketing efforts to see where there were spikes and dips.

## Joining the two together

You're an accountant, so we don't need to tell you it's all in the numbers. By looking at your CRM along with the data and insight you've gleaned from Google Analytics, you'll be able to map out exactly how effective your lead generation activity is.

### Here's an example:

Imagine you can see, through your Google Analytics, that a client saw your PPC campaign for 'outsourced payroll services for start-ups'. They clicked on it and navigated to your website. Then, they filled in a contact form.

At this point, they're in your CRM, and you can see all interactions and conversations from then onwards. Maybe they took up your payroll service and then went on to ask for help in other areas, too – leading to a monthly retainer.

By putting the two together, you'll be able to work out whether the initial investment in PPC spending was offset by the lifetime value of your client.

In other words, was the return on investment worth it?





# Conclusion

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You know by now that setting yourself up to successfully focus on lead generation isn't something you can do overnight.

While you'll start by working out your target audience, it's worth remembering that there might be different segments or strands that make up the whole picture.

That's completely fine, but being able to hone in on as specific a demographic as possible is where you'll start to cut through the noise – your target clients will feel like you're talking to them, and only them.

Defining your USPs is one thing, but knowing how to articulate them in a way that'll encourage business and resonate with your target audience is a different skill. By putting yourself in your client's shoes, and focusing on solving genuine problems that you know they're facing, you'll be on the right track.

If you're already working with clients that match your target audience, ask them what works well for them and what they really need help with. Then, work that into your messaging.

With your target audience and your USPs well-defined, you're ready to start putting things into action. There is no one-size-fits-all – but making sure your website is up to scratch is the best place to start. Don't be afraid to reiterate your key messaging or 'calls to action'. Make it easy for people to contact you, and take it from there.

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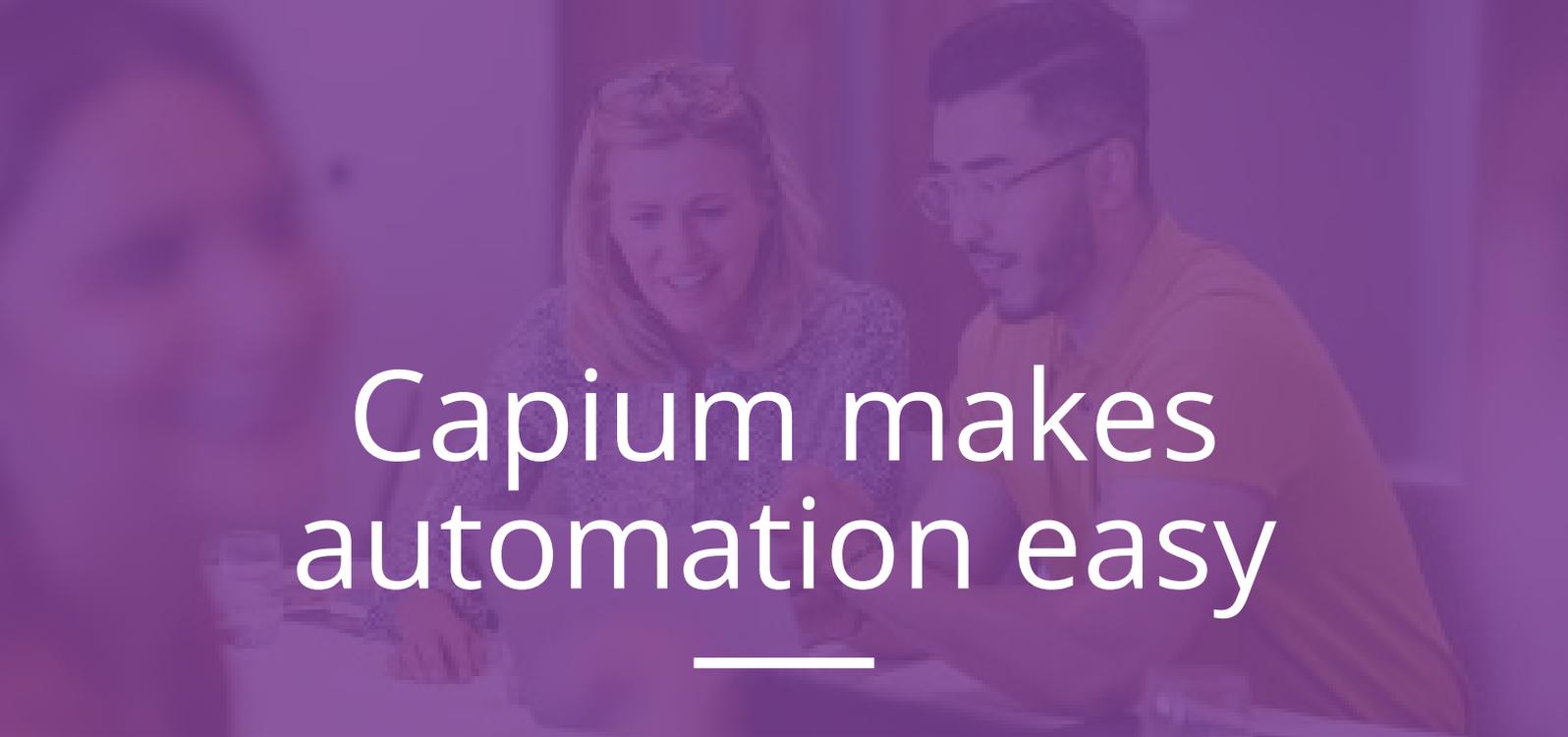
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As far as other marketing activities are concerned, it's really a case of trying out different channels and approaches until you find what works for you. If you're not getting any engagement on social media, for example, and it's a real drain on your time – why continue? Focus your efforts on where you know you'll see real impact.

Finally, measure, measure, measure. Use the tools at your disposal – whether that's a fully integrated CRM, a well set-up Google Analytics account, some in-channel metrics like LinkedIn analytics, or a combination of all three. Try to attribute leads to your activity, and build in time to pause, reflect, and recalibrate your efforts.

With a well-thought-out approach, a clear understanding of what good looks like, and an acceptance that – sometimes – generating leads can be a meandering path rather than a direct route-to-sale, you won't go far wrong.



# Capium makes automation easy

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Capium's award-winning software is designed specifically with accountants in mind, offering an integrated system for practice management and cloud accounting.

It's the easiest way to digitise your firm overnight, from client communications to automated processing of tax returns.

With a customisable set of plans, starting from just £0.69 per client per month, our software is built to support you at every stage of your practice's growth.

**Call us on [0203 322 5578](tel:02033225578) to arrange a demo  
or find out more at [capium.com](https://capium.com)**