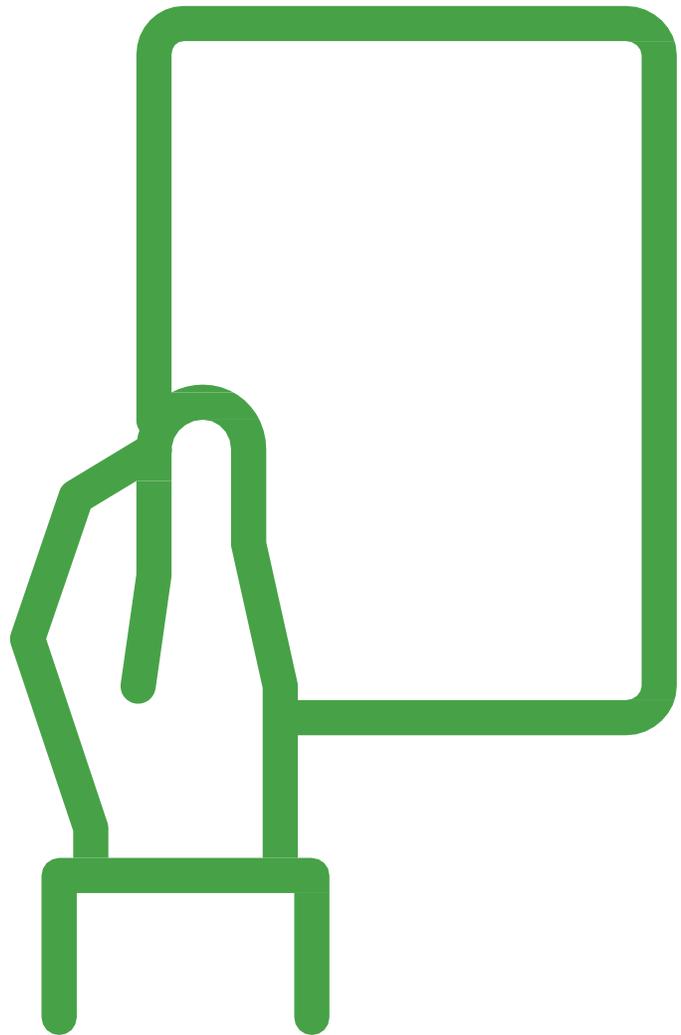


Sage Intacct Accountants Program Marketing Guide



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Introduction

As accounting professionals move into the realm of outsourced accounting and financial advisory services, they are faced with unique challenges—especially in marketing. Regardless of firm size, many accounting organizations face marketing challenges. Whether a firm has internal marketing resources or not, it's important to understand that marketing these types of services is vastly different than that of tax, audit or other related offerings.

To help Sage Intacct Accountants Program members overcome the marketing learning curve, this comprehensive guide offers support in implementing modern marketing principals to fuel the growth of your Sage Intacct revenue stream.

This guide is designed to provide foundational marketing knowledge for your outsourced accounting group, including, steps you can take to further your marketing efforts. It also offers advice on working effectively and collaboratively with internal marketing staff or outside consultants to help achieve your outsourcing business goals.

There are some essential elements that need to be established before creating your marketing strategy and plan, including goal setting, development of the value proposition, internal research, and identification of staffing and resources. The guide begins with these topics.

The Required Evolution of Marketing

Marketing is not a constant. Just as outsourced accounting services have progressed from the days of bookkeeping and after-the-fact reporting, so has marketing, being impacted by consumer preferences and the availability of new tools.

The emergence of new technologies has changed the methods of communication and engagement for both the marketer and the consumer. Like any other area of your business, you must evolve to meet the needs of the broad market.

Traditionally, marketing has not been a big focus for firms and has often received little investment and executive support. At many professional services organizations, the role of marketers has tended to be more of a business development role, responsible

for responding to proposal requests and developing pitch packages.

Today, the role of the marketer has changed to one that helps drive engagement and business demand through relevant content and communications. It has become a more proactive role rather than reactive, anticipating client needs, and in some cases, identifying needs clients didn't even realize they had.

While some firms still blur the lines between marketing and business development/sales, they are different roles and there is a need for each. They interface with prospects at different times and must collaborate. Responsibilities of each are discussed in the staffing section of this guide.

Set Measurable Goals

Before starting the marketing planning process, it's important to set clear and measurable business goals. Think about what you are trying to achieve, and how your marketing efforts will help you reach those goals.

You may have already developed outsourced accounting goals as part of your overall business plan. If that's the case, you may want to revisit them to see if they need to be updated. They should also be communicated with any marketing team members you may have or marketing consultants you work with. It's important to discuss the goals and priorities of the business and ensure everyone is on the same page.

It is important to ensure your Sage Intacct goals align with and support achievement of the overall business goals. All too often the Sage Intacct practice goals do not align with the overall business goals, which introduces significant risk in growing your practice.

Below are examples of key goals:

- Grow company revenue by 20% overall:
 - 3% revenue growth from tax and audit services
 - 5% growth from advisory services
 - 12% growth from technology services (10% will come from Sage Intacct practice)
- Grow Sage Intacct practice:
 - Revenue goal: \$800k
 - New customer acquisition goal: 12 (of the 12, 4 in non-profit to begin building nonprofit practice)

Identifying specific customer acquisition goals will help shape some of your marketing plans. In the example above, the new customer acquisition goal is 12. You can get an idea of how many leads are needed based off prior lead close rates. In addition, with the goal of 4 new non-profit clients, there should be marketing efforts focused on reaching prospects that fit that profile.



Conduct Internal Research & Discussions

Before diving into marketing strategy and even identifying your target markets, it's critical to conduct internal research. Identify the team that should be involved in your internal market research. This team can include industry leads, the Sage Intacct practice lead or partner of the outsourced accounting group, business development or sales representative, as well as members of the marketing team if you have one.

Just as many partners and other stakeholders need to be educated on the types of client accounting services offered today (which are different from traditional bookkeeping services), so must marketers – whether in-house or external. It's important to ensure they have a clear understanding of the challenges the firm's services solve to develop a successful marketing plan.

Once this group is assembled and updated, a full day should be allocated for annual marketing planning each year. There should be ample time for

brainstorming, reviewing results and discussion.

Looking at past results can help determine what's worked and what hasn't, but simply doing something "because it's always been done", is not a reason to continue it. An analysis of prior initiatives should be conducted. Ensure there is a process in place for measurement and feedback immediately following execution of an initiative, otherwise it may be hard to recall specific details. Explore new avenues with conferences and publications and test marketing tactics out.

Topics to Cover in Internal Discussions

- What worked/what didn't: A review of the past year
- What's changing (if anything): ex. New types of services, New vertical focus
- New initiatives to explore
- What we are hearing from prospects and clients



Establish Your Value Proposition

During the internal research phase, information was gathered to help inform the value proposition. Specifically challenges and pain points that the target client is facing and how the firm's services addresses and solves them.

In developing the value proposition, firms must connect the challenges of their clients/prospects with the services and benefits offered. Remember this is for the value proposition of the outsourced accounting services, not the firm in general. Both marketing of the firm and services are important, but they each require dedicated strategies. In addition, it's important to identify and outline what differentiates your services from those offered by competitors.

Client accounting services look very different than they did ten years ago, and you need to educate clients/prospects on the business benefit of these "new" services.

When thinking about positioning and building on the value proposition, it should be targeted to a very specific market segment. The value proposition must encompass a wider reach, while positioning should focus only on benefits relevant for that specific segment. This is where you can address your specific industry target. Speak their language and include their specific industry challenges.

Here's a template for writing a positioning statement:
For [insert Target Market], the [insert firm] is the [insert Point of Differentiation] among all [insert Frame of Reference] because [insert Reason to Believe].

Creating Your Value Proposition

To create a strong value proposition, answer the 5 questions below:

1. Who are you talking to?
2. What problems do you solve?
3. How does your firm solve this problem?
4. Why are you unique?
5. Where's the proof?



Budget Before Planning

You never want to launch into full planning before you have established a budget for marketing efforts. A budget will keep your plan realistic and allow you to grow as your budget does. You would be surprised how much events and advertising campaigns can cost. Even more reason to budget upfront.

For example:

Standard marketing budget: 5% of gross revenue

Firm A: Gross revenue = \$500k

5% of \$500k = \$25,000

That's a little over \$2,000 per month

Start to consider all possible marketing initiatives and then research the cost of each. This will set you up to create a realistic plan based on associated costs.

Consider just a few examples and tips:

Identify the past activities that have provided the greatest return on investment and recycle these initiatives in your new plan (because you already know they work).

- Brainstorm for new activities and research the cost of each. The following are just a few examples of possible new initiatives:
 - Tradeshow attendance: Consider cost of booth, graphics, handouts, technical equipment and trade show fees.
 - Advertising: Consider cost of stand-alone ads versus multiple placements.
 - Email campaigns: Consider the cost of email platforms and any sponsored email sends.
 - Printed campaigns: Consider cost of material development, printing and postage.

To accurately estimate costs, reach out to required vendors for proposals. This exercise should be completed as part of your yearly marketing planning. Meeting with vendors can also help identify additional opportunities and brainstorm other ideas you may have not originally thought of.

Average Costs of Marketing Initiatives and Resources to Consider:

- Conference sponsorship packages can range from \$500 - \$50,000. For events of interest, go as an attendee first to evaluate before committing to a sponsorship.
- Receptions and luncheons can cost between \$2,000 - \$5,000 depending on the size and location. Remember that certain cities are more expensive than others.
- Print and online advertising can cost \$3,000 - \$10,000 for a single placement. You can typically negotiate a better rate for multiple placements.
- Marketing automation tools can range anywhere from \$1,000 - \$5,000 per month depending on your needs and the size of your organization.
- Social media tools can cost as little as \$30 per month depending on the number of user and/or streams.
- Freelance designers and writers are a good option if you don't have someone in house. Depending on the complexity of the project, costs can range from \$200 - \$2,000 per project.

Staff for Success

You need skilled, dedicated staff to launch and maintain a successful marketing program. This can mean assigning marketing duties to someone in-house, if this skill set exists, or hiring to fill this role (full-time, part-time or contractors). What you don't want to do is weigh down non-marketing staff with marketing duties.

While the outsourced accounting team can play a role in providing input for the marketing strategy and plan, firms must identify candidates who will be solely responsible for managing and executing on the marketing plan. While some larger firms may have an internal marketing team they can rely on, others may have limited resources or none at all. Just as your firm recommends businesses outsource functions that they lack expertise in, firms must follow this same advice in relation to marketing. It's not something that can be handled as a side job, and it shouldn't take time away from client service.

Explore and evaluate internal resources that can be leveraged before considering external resources. Tap into your partner networks and seek recommendations. Start small and build out your team over time.



Job Responsibilities

Marketing:

- Plans execution, including brand building and operational activities
- Manages the marketing mix from generating awareness and interest for industries and services to helping close opportunities through strategic opportunity-specific support
- Plans and manages internal communications to drive awareness throughout the firm
- Manages sales support activities, including effective presentations, prospect collateral, proposal content, and large pursuit assistance
- Effectively leverages available CRM and marketing automation tools

Business Development and Sales:

- Works collaboratively with leadership and marketing team to develop and implement sales strategies, plans, and goals
- Researches and contacts key individuals of influence at target companies to develop, assess, and qualify their need for services
- Meets with decision makers at target companies to understand their need for services
- Schedules prospect meetings, follows up on initial contacts
- Develops and maintains a follow up plan for key contacts
- Documents business development activity and pipeline with prospective clients

Choose the Right Technology

To achieve set goals, technology plays a big role in providing a relevant and rich engagement experience for prospects. You must continue to keep a prospect engaged—offering the right content based on where the buyer is in their decision making.

Just as your firm is leveraging a technology stack for your outsourced accounting services to operate more efficiently and deliver a better customer experience, the same is true when it comes to marketing technology. Many tools are available to facilitate communications and expand capabilities. Selecting the right technology should be based on specific firm needs and goals. Spend the time to properly evaluate tools and find the right fit for your firm.

Identifying the tools needed can be a daunting task. Below are the fundamental tools recommended to get you started. As you become more skilled at marketing, you can explore advanced solutions to support deeper marketing data analysis and provide a richer prospect experience.

Customer Relationship Management (CRM): CRM solutions serve as the foundation of a sound marketing technology stack. A spreadsheet to manage customer and prospect information will no longer suffice. CRM helps you more effectively manage all relationships and interactions with existing and prospective clients.

Solutions to consider: Salesforce.com

**Keep in mind that it may be challenging to migrate data if you choose to switch solutions at some point.*

Email and Marketing Automation: Email is still a primary marketing communication delivery tool. It used to be about “batch and blast” emails sent via an email service provider, but now email marketing has progressed to more customized, targeted messaging that can be done through a marketing automation tool.

- Email service provider: Allows you to design and send to a large customer or prospect group with analytics to track opens and clicks.

Solutions to consider: Constant Contact, Mail Chimp

- Marketing automation: In addition to the above, it also offers the ability to create multi-touch email nurturing, landing pages, web forms and more.

Solutions to consider (marketing automation): Marketo, Pardot (Salesforce), ActOn, Hubspot

Website: Your website is your new “front door” to your business. It’s where prospects will go to collect intelligence on your firm and services. Your website should be equipped with content-pushing functionality, such as an active blog and landing pages that house added educational content such as white papers, case studies and other education-based content.

Solutions to consider: WordPress, Joomla

Social Media: Maintaining active social channels is important. Platforms that aggregate multiple social media channels are ideal because they allow you to post to several channels at one time.

Solutions to consider: Hootsuite, Sprout Social, Buffer

Develop Your Marketing Strategy

A marketing strategy sets the overall direction and goals for your marketing, and is therefore different from a marketing plan, which outlines the specific actions you will take to implement your marketing strategy. Your marketing strategy could be developed for the next few years, while your marketing plan usually describes tactics to be achieved in the current year. Develop your marketing strategy by identifying and documenting the following components.

- What are your business goals for your overall business and specifically for your SIAP practice?
- Who are you targeting and selling to? What specific markets are you targeting?
- How will you talk to them? What channels are required develop leads? (e.g., website/SEO, referrals, email campaigns).
- Why will prospects want to talk to you?
 - When someone is searching for comparable services, what will make you stand out? (e.g., client testimonials, company approach, industry expertise).
 - What resources do you have? What do you need? (e.g., personnel, technology, content, referral base).
 - Who is your competition? Create profiles on your competitors to understand their pricing, services, and marketing tactics.



Recommendation: Use PowerPoint and create a slide for each topic below. Your marketing plan will build off this information.

Identify Your Target Markets

As part of developing your overall business plan and strategy for offering outsourced accounting services, you should have identified particular industry clients to focus on. From a marketing perspective, this helps you narrow down your target market considerably, however there are more specific buyer personas within those industries that each have different pain points. By developing buyer personas, you can develop customized messaging that is more likely to resonate with them. As you work with clients you can also develop case studies and industry content that can be used in your prospect outreach.

- **Develop Buyer Personas:** Personas are a representation of your ideal customer, based on market research and real data about your existing customers. When creating your buyer personas, consider including customer demographics, behavior patterns, motivations and goals. The more detailed you are, the better.
- **Identify Vertical Markets:** Operating within a specific industry (vertical) allows you to fully understand that market's uniqueness—its trends, terminology, challenges, competitive tendencies, and other key attributes of a business environment. Specializing in a vertical helps you bring more insight and become an integral part of your clients' business.



Table 1. Buyer Personas and Target Markets Example

Revenue	\$1 – \$10M	
Employee	35 – 500	
Geography	North Carolina/Charlotte	
Horizontal	QuickBooks/General Business	Unique characteristics: <ul style="list-style-type: none"> • Growing organization • Full-time controller • Belief in the cloud • Salesforce.com users • QuickBooks graduates • Multi-entity businesses
Buyer/Decision Maker Persona - External	Controller	Accountant
1) Background	CPA Industry experience	<ul style="list-style-type: none"> • May have public accounting experience; • Looking for knowledge and experience
2) Familiar Systems	Used QuickBooks or Microsoft Dynamics	Proficient in Excel
3) Goals	<ul style="list-style-type: none"> • Protect assets • Compliance • Manage transactions • Fast, accurate close • Financial reports 	<ul style="list-style-type: none"> • Process transactions • Compliance with company policy • Assist in closing the books correctly, timely • Keep Controller informed of exceptions
4) Behavior/Motivations	<ul style="list-style-type: none"> • Manage transactions reporting • Fast, accurate close • Compliance and process • Billing and collections 	<ul style="list-style-type: none"> • Manage transactions in an efficient, compliant process • Billing: Manual effort • Revenue accounting • Growth in transactions: Never enough time to get it all done

Table 2. Existing Clients Example: Repeat Steps 1-4

Buyer/Decision Maker Persona - Internal	Existing Clients	CPA partner/industry focused
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Table 3. Individual Verticals Example: Repeat Steps 1-4

Industry/Verticals	<ul style="list-style-type: none"> • Not-for-profit/diocese • Professional services/field services • Financial services/family office • Healthcare/ambulatory services • Retail, franchises and hospitality/restaurants 	Unique characteristics
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Define Your Buyer's Journey

Once you have defined your buyer personas and vertical markets, you are ready to plot your unique buyer's journey. Remember, the buyer's journey is the process buyers go through to become aware of, evaluate and purchase a new product or service. Understanding the journey helps you identify the marketing response and content that will be needed to meet the buyer's needs.

Today's buyers are collecting the majority of information upfront and educating themselves on your services from information they can find online well before they reach out to a sales or client representative. This is vastly different from years prior when the only means of getting more information was to directly call a business.

Consumers simply don't require as much time with sales people these days, nor do they desire it. When was the last time you encountered a prospect eager to speak with a sales representative? Buyers do not want a sales pitch. They simply want to make smart, informed decisions on services that help them solve business challenges and positively impact growth.

With this in mind, it's important to understand how the buyer's journey has dramatically shifted over time. Today's buyers want to conduct as much of the education part of the buying journey on their own—without involving a sales person. The diagram below outlines the journey—aligning the buyer's needs with the required actions of the business.

Below is a detailed example:

Stage	Characteristics	Marketing Response/Content
Awareness	<ul style="list-style-type: none"> Realizing a want or need for a product or service Entering search terms in Google to clearly understand more about what it is they are looking for Seeking information to answer questions or resolve pain points 	Website: SEO/Keywords: Prevent, troubleshoot, improve <ul style="list-style-type: none"> Educational blog posts eGuides and eBooks White papers Industry research/analyst reports
Consideration	<ul style="list-style-type: none"> A buyer's evaluation of different methods that are available to them 	Website: SEO/Keywords: Provider, service, tools <ul style="list-style-type: none"> Product/Service comparison guides Expert guides Live interactions: Podcast or video
Decision	<ul style="list-style-type: none"> Buyer has decided on a solution category Strategy in place to address their pain point, still deciding on a specific tool or vendor Time researching documentation, data, vendor reviews, and other materials to make buyer confident about their decision 	Website: SEO/Keywords: Compare, pros and cons, review, test <ul style="list-style-type: none"> Vendor/product/service comparisons Case studies Free trials

Create Your Marketing Plan

The purpose of the marketing plan is to establish a roadmap for marketing activities and ensure accountability throughout the year. The marketing plan outlines the tactical actions needed to achieve the goals and objectives identified in your marketing strategy.

Typically this is a comprehensive document that includes every marketing activity for the year along

with the timeframe of each initiative. It should be updated with any changes throughout the year.

The example below outlines the key areas that should be included in the marketing plan along with appropriate metrics. When putting together the plan, list out the details. For example, for a conference, include name of conference, date, audience, planned activities, projected leads and any follow up activity.

Table 5. Marketing Plan Example

Marketing Plan	Initiatives	Key Metrics
Brand Awareness	Create familiarity with your firm brand—name, characteristics, logo, and services through advertising and media placements, and website	<ul style="list-style-type: none"> • Survey responses • Website traffic/inbound lead volume • Search volume data • Speed of opportunity to sale
Demand Generation	Drive interest in your services through content, and nurturing of prospects	<ul style="list-style-type: none"> • Downloads • Lead conversion
Existing Customer/Relationship	<ul style="list-style-type: none"> • Engage via educational messaging—build trusted advisor role • Identify existing clients that fit target market 	<ul style="list-style-type: none"> • Additional service leads • Customer renewals • Customer retention
Referral Strategy	<ul style="list-style-type: none"> • Internal CPA approach <ul style="list-style-type: none"> ◦ Industry client engagement team/partners • External partnerships • Defined referral program 	Number of referrals/month
Social Media	<ul style="list-style-type: none"> • Twitter • LinkedIn Sources: Blogs, Press, Customer Stories	<ul style="list-style-type: none"> • Followers • Shared content • Connections
Website/SEO	<ul style="list-style-type: none"> • Client Log-in portal • Landing page(s) (general, vertical) • Buyer's journey content: <ul style="list-style-type: none"> ◦ Gated content ◦ Blogs ◦ Customer testimonials ◦ Customer case studies 	<ul style="list-style-type: none"> • Google analytics • Inbound leads (Gated content, contact us, calls)

Marketing Plan	Initiatives	Key Metrics
Email	<ul style="list-style-type: none"> Prospects: Campaign(s) (bi-weekly) Engaged prospects/leads: Nurture (monthly) 	<ul style="list-style-type: none"> Click rate Open rate Leads/Opportunities
Events/In Person	<ul style="list-style-type: none"> Webinars (quarterly, educational) Executive events (2/year) Tradeshows (2/year) 	<ul style="list-style-type: none"> Registrants/attendees Follow-up meetings Leads/opportunities
Build Prospect Database	<ul style="list-style-type: none"> Sponsorships List purchase/rental Events Referrals 	Grow database to XXX by XXX
Customer Testimonials	<ul style="list-style-type: none"> Quotes Videos Written case studies 	One endorsement per client
Reporting	Monthly and quarterly marketing reports	ROI by lead source
Lead Management	<ul style="list-style-type: none"> Define Terms (what is a prospect vs lead vs opportunity) Track over time 	<ul style="list-style-type: none"> Prospect to lead conversion Lead to opportunity conversion Opportunity to sale conversion

Present Plan to Key Stakeholders

Once the plan is developed, the team is assembled, and resources are identified, it's time to conduct a formal presentation of your plan to key stakeholders. This may include partners, practice leads and business development professionals. The purpose of this is to ensure everyone is on the same page and you have buy-in.

Limit discussion during this meeting, as the plan should be based on prior discussions. The goal of this meeting is to get agreement from all

stakeholders to cement the plan moving forward. This will prevent veering of course during the year. It's expected that there may be some changes during the year based on changing needs, so the plan should allow for some flexibility.

Ongoing status updates, including results of key campaigns should be shared with the team throughout the year as well. A review of the prior quarter should be included, as well as what's coming in the next quarter.

Measure Results and Report on ROI

Marketing success depends on consistent measurement. Measuring initiatives on the basis of success (click through rates, downloads, conversion rates), enables you to recognize what's working and what's not so you can invest in efforts that generate leads, opportunities and sales. Overall, measuring results allows you to more efficiently report on ROI.

Using these types of reporting you can identify what marketing activities are bringing in the highest quantity of leads and their quality. If you have a high number of leads not translating to opportunities and deals, you can focus on how to improve the quality of those leads.

If you have a small number of leads but high opportunity and deal conversion, you can focus on how you get more of those types of leads.

Reporting examples: Revenue by Lead Source

- 1) Review Monthly/Quarterly/12 months
- 2) Break down lead sources by activity type, stay consistent

Marketing Activity	Budget	GOAL # prospects	Conv to Lead %	Goal # of MQL	Actual # of MQL
PPC/ADS	\$ 15,000	180	10%	45	
Referral Program	\$ 500	24	75%	18	
Email Campaigns	\$ 6,000	1500	5%	75	
Webinars	\$ -	100	25%	25	
Tradeshow	\$ 2,500	1200	25%	300	
NFP Campaign	\$ 7,000	500	10%	50	
		3504	15%	513	

LEAD SOURCE	ACTUAL \$ Spent	# of fundraisers	\$ PER LEAD	# OF MQLS	\$ PER MQL	# OF OPPS	\$ PER OPP	DEALS	\$ PER DEAL
EX. Website/ Inbound marketing	\$ 3,000	100	\$ 30	20	\$ 150	5	\$ 600	1	\$ 3,000
EX. NFP Campaign	\$ 1,000	60	\$ 17	20	\$ 50	5	\$ 200	1	\$ 1,000
EX. Referral	\$ 200	10	\$ 20	8	\$ 25	5	\$ 40	3	\$ 67
EX. Events	\$ 5,000	50	\$ 100	35	\$ 143	5	\$ 1,000	2	\$ 2,500
EX. Tradeshow	\$ 5,000	500	\$ 10	15	\$ 333	5	\$ 1,000	1	\$ 5,000
Total	\$ 14,200	720	\$ 20	98	\$ 145	25	\$ 568	8	\$ 1,775
Average Conversion Rate				14%		26%		32%	

*MQL= Marketing Qualified Lead

Educate Internally

We find many high-quality leads come from referrals within the firm. For this reason, you must ensure that other practice areas and all office locations know about your services and understand how they can benefit clients.

For instance, during tax season, many of your firm's tax professionals are face-to-face with clients who may also be strong candidates for outsourced accounting services. By providing them with the right information and talking points, they can help identify new sales opportunities.

In working with your colleagues, you can establish an internal lead referral program that may even include incentives to garner their support.

The benefits for establishing an internal lead referral flow are:

- ✓ Customer acquisition cost (CAC) is dramatically reduced.
- ✓ The client has the experience of working with you and that removes the unknown of going with another partner organization.
- ✓ Lower cost of sale – shorter, easier sales cycle is increased because there is less competition. As a result, deals tend to close faster.
- ✓ Less risk of losing a client when the firm can keep the customer in-house using multiple business groups.

To Develop this approach:

- ✓ Establish incentives (ex referral fees, recognition, prizes)
 - Effective referral programs reward individuals that bring in referral leads, but what the reward is comprised of is completely up to you. These rewards are more cost-effective than reaching prospects on your own.
- ✓ Set up an internal site or landing page
 - Provide valuable content that can be easily shared with potential referrals
 - Provide prominent referral call to action buttons
- ✓ Educate the partners and appropriate customer facing roles
 - Lunch-n-Learns (in-person or video conference)
 - Tailor content to practice/industry focus
 - Discuss referral program (from recognition to \$ incentives)
 - Emphasize the benefits (ex. Lessen pain around Fiscal YR end, tax time, etc.)
 - Promote internal website/landing page to spotlight why outsourcing/virtual CFO highlighting the benefits (not the product) Sage Intacct provides.
- ✓ Demonstrate commitment
 - Define long-term growth plan and establish executive support
 - Create organizational visibility (dashboards, reporting, win wires)
 - Communicate success internally

Bringing It All Together

This guide was developed to serve as a comprehensive roadmap for firms looking to establish a sound marketing program or enhance an existing program. Despite firm size, marketing is, to some degree, foreign to accounting professionals. However, by following the basics of marketing, as offered in this guide, firms can successfully build awareness of your services and move prospects through the funnel to conversion.

CPA.com and Sage Intacct are here to support you with your marketing efforts and can help your firm develop a solid marketing plan and identify the appropriate resources to execute it.

We encourage you to take advantage of the resources offered through CPA.com and Sage Intacct to ensure your marketing success! Below you will find links to some of the key resources. Be sure to visit the Sage Intacct Community to access the full list of marketing tools and education available.

[Sage Intacct Community](#)

[New Business Accelerator Funds Turnkey Programs](#)

[New Business Accelerator Funds Submission Form](#)

[SIAP GTM/Marketing plan template](#)

[Marketing plan reporting templates](#)

Marketing Boot Camp Series (Search for “boot camp” on the Sage Intacct Community)

[SIAP Logo](#)

[SIAP Logo Guidelines](#)

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