



## INDUSTRY

BOOKKEEPING

## SCOPE OF WORK

CHALLENGE WAS TO INCREASE CONVERSION RATE, ATTRACT MORE HIGH END CLIENTS (NOT SMALL BUSINESS), SET UP A PIPELINE

## RESULTS

AMENDED THE WAY PRODUCT WAS SOLD, AMENDED BRAND POSITIONING, STARTED TARGETTED BIGGER COMPANIES ON DIFFERENT CHANNELS. COMPANY ENDED UP BEING BOUGHT OUT, A GREAT RESULT.

## OVERVIEW

Our client, was a dynamic and growing bookkeeping firm specialising in assisting small to medium-sized businesses across various industries. They provided an array of services ranging from daily bookkeeping and reconciling to payroll and even some HR help, delivering accurate financial records, cash flow management, and compliance support, enabling business owners to focus on growth rather than administration.

## Challenges

Despite their expertise and a loyal client base, our client faced several challenges:

1. **Low Conversion Rates:** Initial meetings with potential clients were positive, but after sending a follow-up quote, many prospects would find the services too expensive and disengage.
2. **Difficulty Targeting Larger Businesses:** They wanted to attract businesses with 20+ employees however consistently drew in smaller clients.
3. **Attracting Price-Conscious Clients:** Their advertising on Facebook attracted clients focused solely on cost, leading to wasted marketing spend.
4. **Lack of Documented Customer Feedback:** Despite providing exceptional service, they lacked third-party proof, such as testimonials and reviews.
5. **Ineffective Networking:** Their team's pitch and approach at networking events failed to resonate with ideal clients.
6. **Limited Referral Partners:** They did not have strong partnerships with key referrers like accountants and business coaches.

## Solutions

1. **Real-Time Pricing Tool for Meetings:** We developed an interactive pricing calculator on an iPad that allowed clients to select services/ products during the meeting, displaying a live monthly cost. This empowered clients to adjust their package on the spot, removing objections and boosting conversion rates to 84%.
2. **Brand Positioning for Larger Clients:** We refined their visual identity, including updated fonts, professional language, and high-end imagery. This polished presentation appealed to larger businesses.
3. **Shift to LinkedIn Marketing:** We moved their advertising efforts from Facebook to LinkedIn, targeting business professionals. Before engaging a direct marketing strategy, we optimised their LinkedIn profile and created a capability flyer and content that aligned with high-value prospects' expectations.
4. **Gathering Customer Feedback and Reviews:** We set up their Google My Business profile and reached out to current and past clients for feedback. This generated strong testimonials and Google reviews, reinforcing their reputation.
5. **Improved Networking Strategy:** We crafted a compelling 30-second pitch and trained their team to deliver it confidently, making their networking efforts more effective.
6. **Referral Partnerships:** We developed tailored partnership offerings for accountants and business coaches, leading to a steady stream of qualified referrals.

## Results

These comprehensive changes delivered transformative results:

1. **Conversion Rates Increased to 84%:** The live pricing tool removed objections and empowered clients to make confident decisions during meetings.
2. **Higher Quality Leads:** Targeting larger businesses on LinkedIn with a refined brand and strong collateral attracted the right clientele.
3. **Improved Efficiency of Marketing Spend:** The shift from Facebook to LinkedIn reduced unqualified leads and maximized ROI.
4. **Strengthened Reputation:** Google reviews and client testimonials showcased their exceptional service, enhancing trust and credibility.
5. **More Effective Networking:** A refined pitch and confident team elevated their presence at networking events.
6. **Stronger Referral Network:** Partnerships with accountants and business coaches fuelled sustainable growth.

## Conclusion

With strategic marketing, refined processes, enhanced branding and sales tips, our client transformed their business. Their growth and strengthened market position attracted the attention of an NSW-based company, leading to a successful acquisition—a testament to the power of focused strategy and execution.

