

# Building Your Online Marketing Machine



A Two Part Webinar:  
Infusing Your Practice  
with New, Ideal Client  
Relationships

**WOODARD™**

# Agenda for Today's Webinar

- Look at a case study of a CPA client that generated 600+ calls from online sources of new business during the busy season - and did it in a way that their competition couldn't match
- Identify "SERP STACKING": How to dominate the search engines using Maps, Local Listings, and other "hidden" sources and create MULTIPLE links to your firm's content on the first page of relevant Google results
- Determine how to finally get your social media marketing put on autopilot so scores of targeted prospects for your services can find you and hire your firm
- Identify how to get past the jargon and overwhelm of the internet marketing landscape in 2021 to zero in on the CRITICAL components of an online marketing machine



# Nate Hagerty

- Former Marketing Director of multi-million dollar firm
- Author of *The Complete Online Marketing Machine for a Modern Tax & Accounting Firm*
- Widely accepted as the premier expert for online marketing for independent accounting & tax firms since 2007
- Member of Mensa, 3x recipient of “Top 40 under 40”



# Christian Jones

- Director of Search
- Directs team of 7 who have personally driven 110,103+ actions on Google on behalf of clients over the last 18 months
- Small business owner for 14+ years
- Husband to Christiana and father to Hudson (2) , baby Jane





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# Basic Assumptions

1. You Know You Need More Than a Website
2. Conversion-orientation
3. Email is your hidden weapon
4. Tactics are constantly changing
5. Relationship journey

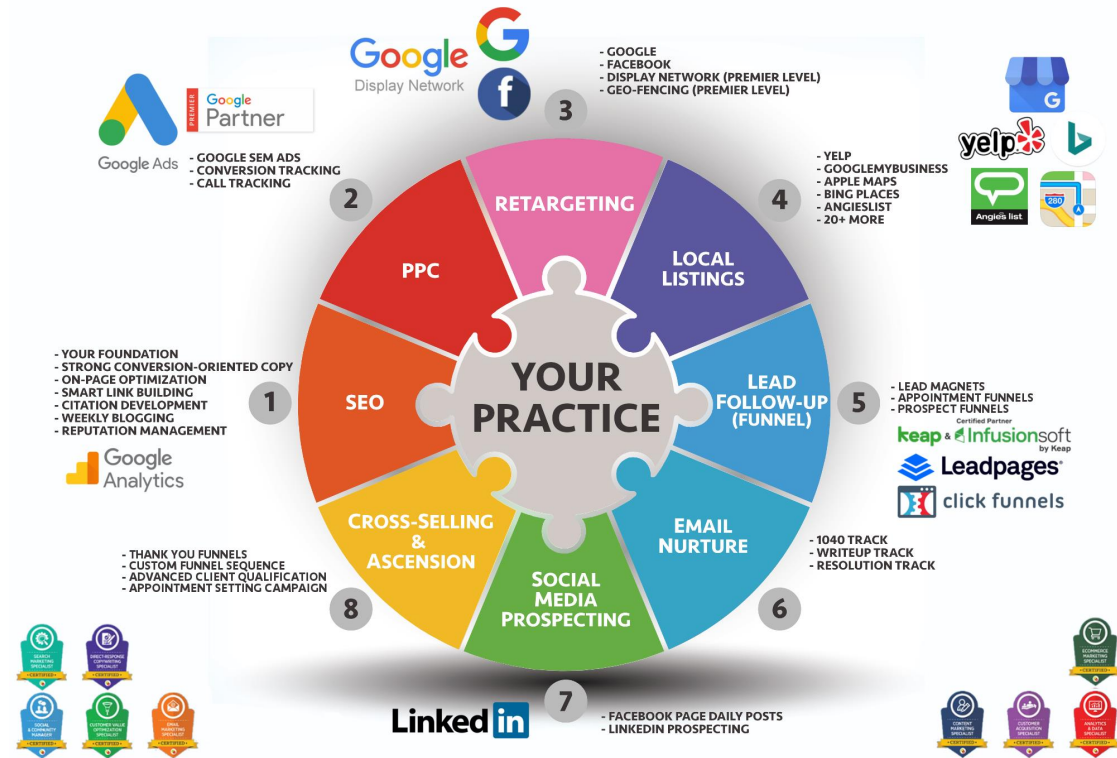




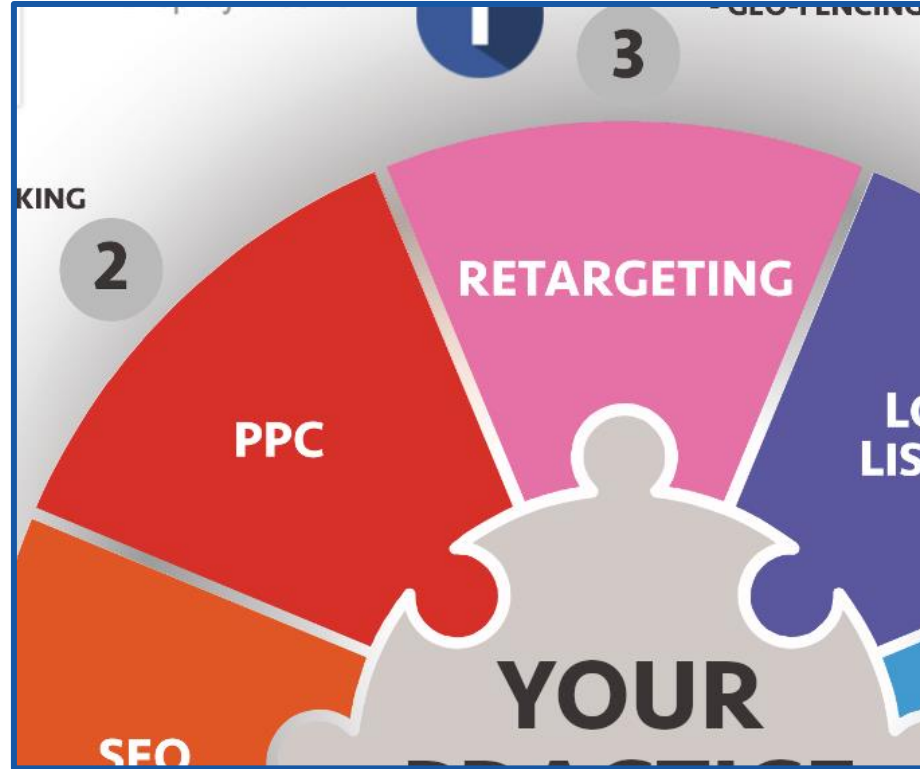
# The Online Marketing Relationship Journey

1. Awareness
2. Engage/Subscribe
3. Convert
4. Ascend

## AdvisorProMarketer **DIGITAL DOMINANCE METHOD**®








## Time to Advertise


How do I rank here?



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**Laursen Kathy B**

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 1201 Walnut St # 1700  
 (816) 221-6300

   
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**Van Dyke M James**

No reviews · Accountant

# Why Most PPC Campaigns Fail



- Fail to understand the AdWords Auction Process and the complexity of the CPA & Tax industry
- Setup only ONE ad group for all services (tax prep, tax planning, bookkeeping, valuation, tax problems, accounting, etc.)
- Only leverage one ad strategy available through Google
- No strong call to action or OFFER on the landing page





# How to Structure Your PPC Campaign

- Conversion tracking is a MUST
- Your campaign must be broken into smaller ad groups targeting the various services that you provide so that your text ads match what the person typed
- Make sure you have a strong understands of keyword match types & don't forget about negative keywords
- You have to land visitors on solid-well thought out pages on your site that are built to convert

# How to Structure Your PPC Campaign

- Ongoing split testing, tweaking & fine tuning
- You need to write compelling text ads that resonate with what the customer typed and entice them to click on you vs. the competition
- Leverage Ad Extensions to make your Ad Stand out on the Page

# Google Search Campaign

## Ad Client

- Targeting the following local prospects
  - Business Owners
  - Tax Resolution Leads

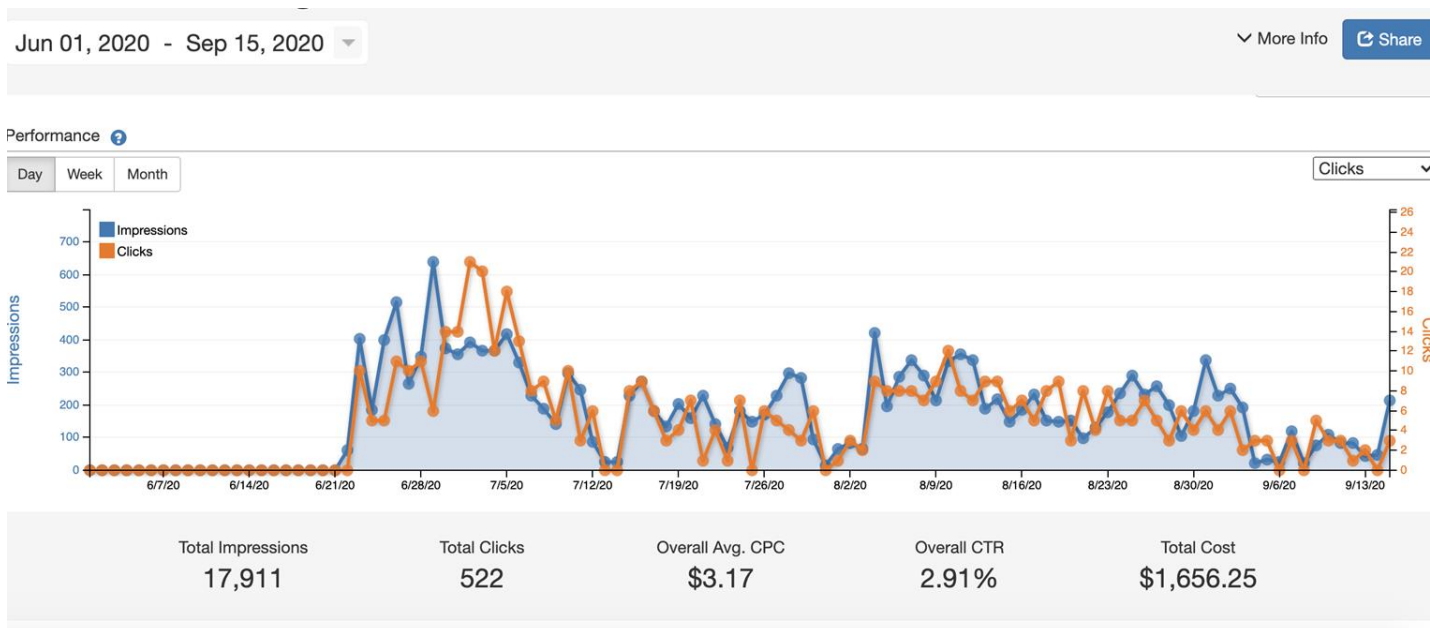




# Google Search Campaign

## June 1st - Sept 15th

- 17.9k Impressions
- 522 Clicks
- 2.91% Click-Through-Rate
- \$3.17 Cost Per Click
- \$1,656.25 ad-spend



# Google Search Campaign

## Keyword Performance

	Keyword ?	Impressions ?	Clicks ?	CTR ?	Avg. CPC	First Page Cpc	Top Of Page Cpc	Cost	Status	Conversions ?
	+sba +loan	7,020	149	2.1%	\$3.07	\$0.00	\$0.00	\$457.55	NaN	
	sba loan	5,166	251	4.9%	\$3.21	\$0.00	\$0.00	\$805.71	NaN	
	sba loan	1,893	51	2.7%	\$2.94	\$0.00	\$0.00	\$149.76	NaN	
	+ppp +loan	597	7	1.2%	\$3.82	\$0.00	\$0.00	\$26.73	NaN	
	ppp loan	497	2	0.4%	\$3.48	\$0.00	\$0.00	\$6.96	NaN	
	+stimulus +bill	415	11	2.7%	\$3.36	\$0.00	\$0.00	\$36.93	NaN	
	ppp loan	317	5	1.6%	\$2.99	\$0.00	\$0.00	\$14.95	NaN	
	stimulus bill	189	2	1.1%	\$3.50	\$0.00	\$0.00	\$7.00	NaN	
	+sba +ppp	156	3	1.9%	\$2.71	\$0.00	\$0.00	\$8.12	NaN	
	stimulus bill	127	2	1.6%	\$2.79	\$0.00	\$0.00	\$5.58	NaN	
Totals	N/A	17911	522	2.9%	\$3.17	\$0.00	\$0.00	\$1656.25	N/A	NaN

# Google Search Campaign

## Conversions

Impressions ?	Clicks ?	CTR ?	Avg. CPC	Cost	Status	Conversions ?
17911	522	2.9%	\$3.17	\$1656.25	N/A	29



Prospects directly  
engaging



# Google Search Campaign

## Form Fill Examples

29 form fills from June 23 – September 15

Do you own a business?

YES

Do you currently have any back taxes?

YES

If so, what is the approximate amount?

100,000

Do you currently have an in-house bookkeeper or accountant?

YES

Do you own a business?

YES

Do you currently have any back taxes?

NO

If so, what is the approximate amount?

15000

Do you currently have an in-house bookkeeper or accountant?

NO

# Google Search Campaign

## Call and Average Talk Time

Source ?	Total	<u>Avg. Talk Time</u>
Google Ads	5	3:27
Ad Extension	13	1:38
N/A	18	2:02

# Google Search Campaign

## June 1<sup>st</sup> – Sept 15<sup>th</sup> Conversions

- 17.9k Impressions
- 522 Clicks
- 2.9% Click-Through-Rate
- Prospects who reached out directly
  - 29 Forms Filled
  - 18 Calls (mostly from ad-extension)
  - 2-minute talk time average



# Google Search Campaign

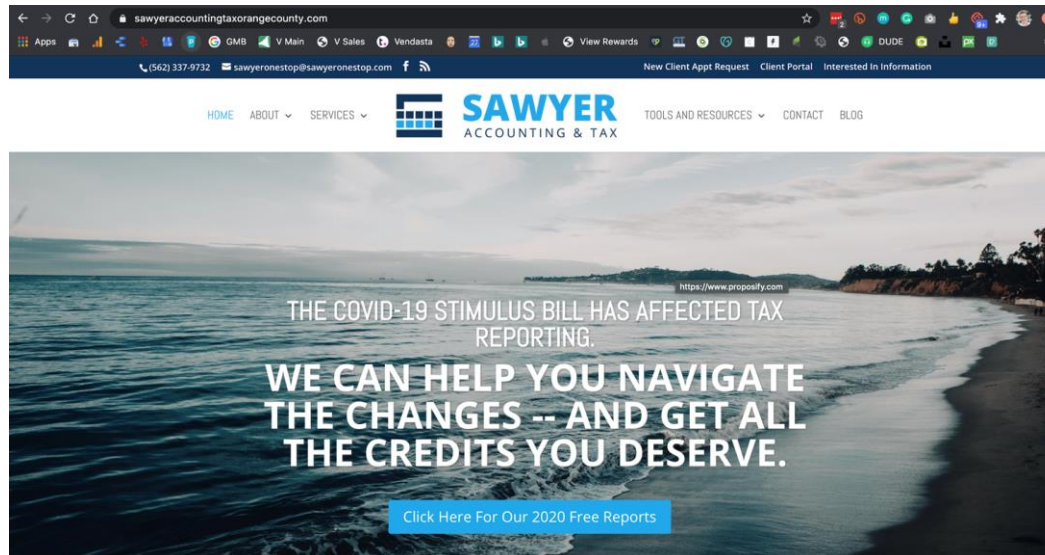
**What's it worth to you?**

What would you pay for 47 real, pre-qualified prospects, who are *reaching out to you* over three months? What are they worth to you?

# Google Search Campaign

## Ad Client

- Targeting the following local prospects
  - Business Owners
  - Tax Resolution Leads



# Google Search Campaign

## June 1st - Sept 18th

- 29.6k Impressions
- 2,262 Clicks
- 7.63% Click-Through-Rate
- \$0.79 Cost Per Click
- \$1,789.12 ad-spend

### Sawyer Accounting & Tax

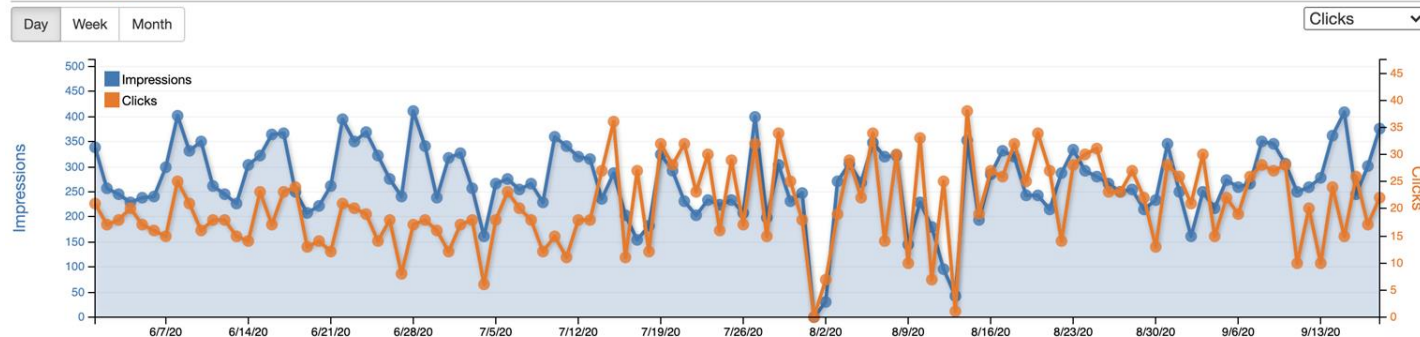
Customer

Jun 01, 2020 - Sep 18, 2020

More Info

Share

#### Performance ?



Total Impressions

29,650

Total Clicks

2,262

Overall Avg. CPC

\$0.79

Overall CTR

7.63%

Total Cost

\$1,789.12

# Google Search Campaign

## Keyword Performance

	Keyword <sup>?</sup>	Impressions <sup>?</sup>	Clicks <sup>?</sup>	CTR <sup>?</sup>	Avg. CPC	First Page Cpc	Top Of Page Cpc	Cost	Status	Conversions <sup>?</sup>
	cares act	6,990	1,214	17.4%	\$0.73	\$0.00	\$0.00	\$888.76	NaN	
	stimulus package	8,142	306	3.8%	\$0.75	\$0.00	\$0.00	\$229.67	NaN	
	stimulus package	6,529	253	3.9%	\$0.89	\$0.00	\$0.00	\$226.21	NaN	
	stimulus package 2020	2,339	197	8.4%	\$0.96	\$0.00	\$0.00	\$188.91	NaN	
	tax service near me	958	48	5%	\$1.00	\$0.00	\$0.00	\$48.21	NaN	
	2020 care act	310	39	12.6%	\$0.64	\$0.00	\$0.00	\$25.08	NaN	
	small business stimulus grants	207	38	18.4%	\$0.94	\$0.00	\$0.00	\$35.72	NaN	
	stimulus bill	955	29	3%	\$0.85	\$0.00	\$0.00	\$24.72	NaN	
	tax prep	983	24	2.4%	\$0.95	\$0.00	\$0.00	\$22.90	NaN	
	business tax accountant	400	18	4.5%	\$0.91	\$0.00	\$0.00	\$16.42	NaN	
Totals	N/A	29650	2262	7.6%	\$0.79	\$0.00	\$0.00	\$1789.12	N/A	NaN

# Google Search Campaign

## Call and Average Talk Time

Sawyer Accounting & Tax							Customer
Jun 01, 2020 - Sep 18, 2020							Share
Calls by Source							
Source	Total	Avg. Ring Time	Ring Time	Avg. Talk Time	Talk Time	Duration	Avg. Duration
Google Ads	123	1:45	115:18	4:15	420:34	535:52	5:51
N/A	123	1:45	115:18	4:15	420:34	535:52	5:51



# Google Search Campaign

## June 1<sup>st</sup> – Sept 18<sup>th</sup> Conversions

- 22.6k Impressions
- 2,626 Clicks
- 7.63% Click-Through-Rate
- Prospects who reached out directly
  - 128 phone calls!

# Google Search Campaign

**What's it worth to you?**

What would you pay for 123 real, pre-qualified prospects, who are *reaching out to you* over three months? What are they worth to you?



# Follow-Up Tactics

1. Multiple way to capture  
(lead magnet,  
appointment, phone,  
social)



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**Discover the positive impact outsourcing your bookkeeping can have on your business or non-profit.**

## Get your free strategy session

You are just a few questions away from talking with our expert team of business & non-profit focused CPA professionals.

Are you a Business or Non-Profit Owner?

YES

NO

NEXT →

1 of 8

# Get your free strategy session

You are just a few questions away from talking with our expert team of business & non-profit focused CPA professionals.

**Congratulations! You qualify for a Strategy  
Consultation.**

Complete just a few more questions to help us get in contact with you...

4 Questions

← PREVIOUS

NEXT →

# Form Fill Examples

Do you own a business? YES

Do you currently have any back taxes? YES

If so, what is the approximate amount? 100,000

Do you currently have an in-house bookkeeper or accountant? YES

Do you own a business? YES

Do you currently have any back taxes? NO

If so, what is the approximate amount? 15000

Do you currently have an in-house bookkeeper or accountant? NO

# Follow-Up Tactics

1. Multiple way to capture  
(lead magnet,  
appointment, phone,  
social)
2. Intake Sequence  
(indoctrinate,  
conversational)





# Follow-Up Tactics

1. Multiple way to capture  
(lead magnet,  
appointment, phone,  
social)
2. Intake Sequence  
(indoctrinate,  
conversational)
3. Go after ENGAGEMENT



**“Due to the coaching I received –  
plus the tools and resources provided  
-- my practice exploded this year,  
with full practice revenues increased  
by  
70 percent.”**

**Kyle Nagy, CPA  
Kansas City, MO**



**“I wanted to let you know what a great job you guys are doing. My calendar is getting booked up just off of the emails you guys are sending. Also, I’ve been able to capture some new testimonials from clients responding to the emails. I should have done this years ago.”**

**-Carletta Price, CPA  
Deridder, LA**





# What Makes Emails Work?

- Relational (1 to 1)
- Real value (not just agitation and pitch)
- Timely information
- Consistency



Nate,

With the passing of Justice Ginsburg 45 days before the election, we have officially entered the political crazy season.

This -- on top of so much conflict surrounding public health measures. It is also in addition to all of the conversation around racial pain, the difficult issues surrounding so many protests and urban riots. And many are without meaningful work and/or are dealing with schoolchildren at home while having to navigate all of this.

So this little political firecracker landed right in the middle of a dry pile of cultural tinder, and it's getting hot in here.

**And that's why this is the perfect time to do some life planning.**

*Wait -- WHAT, Roger?*

That's right, I said it. This is the ideal time to take a hard look at what you are really working and living FOR. Because when you have clarity about these things, you have the ability to put all of these issues in their proper place.

**When you get clear on your direction, you have the ability to build a financial fortress, because you can decide what to build on ... and what to eliminate from your life.**

(And, of course, we can help you build the tax-saving walls around that very fortress: )

Now for some portion of my readers, these political and cultural events DO have real impact on their day-to-day lives. For a host of reasons, these things are directly pertinent to their work, their families, and their outcomes.

But that number might be much smaller than is the number of my readers who are allowing (yes, *allowing*) these cultural riptides to keep them from moving their lives forward.

And today, I suggest that one strong antidote to the feelings of helplessness and anxiety that are running rampant around you (and maybe within you) is to take some time ... to dream.



## "Real World" Business Strategy About That PPP Forgiveness Application ...

*"The key to everything is patience. You get the chicken by hatching the egg, not by smashing it." - Arnold H. Glasow*

Banks and lenders are beginning to release PPP forgiveness applications, and we have been working with some clients to help them put this together.

So here's some advice.

**It might make sense to hold your fire on this application process if your PPP loan was less than \$150K.**

This is not a "definitely happening" development, but as we have been listening to webinars and researching the process on behalf of our clients, we are hearing more and more bankers and experts suggest that a VERY simple form will be established for businesses with these kinds of loans.

This would be more than merely streamlined but something more akin to a simple "attestation" that would need to be signed, simply declaring that the funds were used in the manner for which they were applied.

That would mean no complex paperwork, no days of digging into records, etc.

So if what we are hearing about comes true (and this is still "if"), I recommend waiting until this "streamlined" new rule comes out....or, see if it gets trashed. Either way, we should hear something pretty soon.

The reason people are predicting this as a strong possibility is that the number of forgiveness applications that would need to be reviewed that fall into this category is astounding, and the SBA is already (and still) overwhelmed.

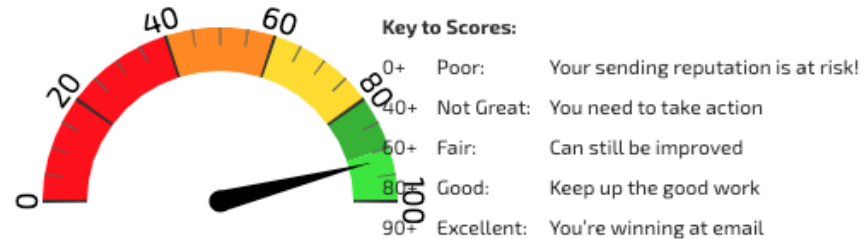
**This is not an "official" recommendation, and you should check your deadline with your banking contact.** It usually is 24 weeks after funds were received.

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# What is The Data Saying?

## Email Health Check

Your Email Health Score is 92 out of 100 - This is Excellent!



This Email Health Score was last updated 4 hours ago

## A Few More Stories

**"I thought marketing emails were stupid and would never work, but then my clients started responding with stuff like, 'These are great', and 'Love the emails'. I fully expected snarky responses, but it's only been positive. I was shocked and realized I should've been doing this earlier."**

*Roland F, CPA*

## A Few More Stories

"Tell Nate we have had great response to his recent emails and have even gained a few new clients that have been receiving them for a few years now.

Thank you again for all your help."

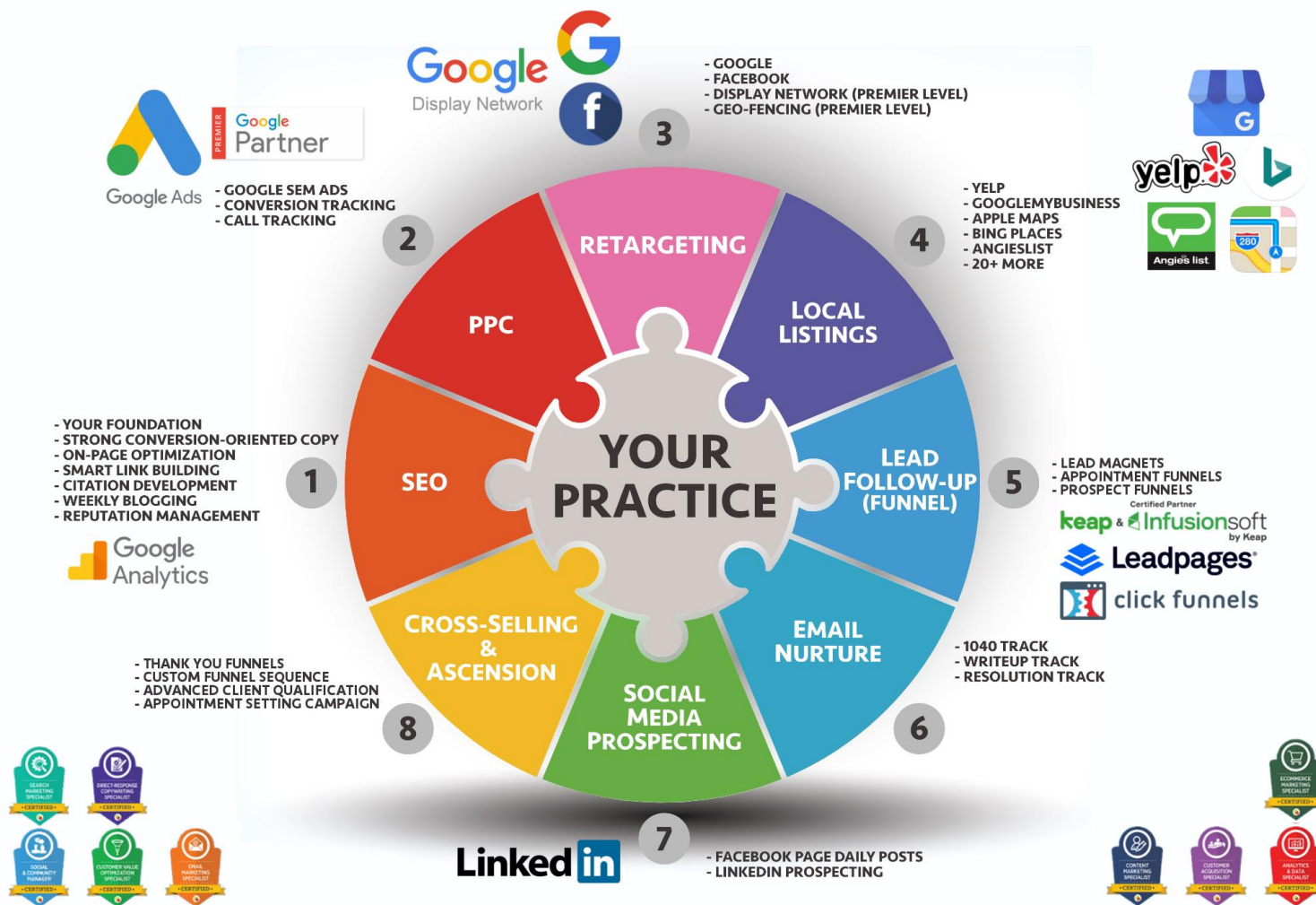
*Mike M*

## A Few More Stories

“A client left me years ago for undisclosed reasons. I inquired, as I always do, when a client leaves but all I got back was a terse email saying, “I can not put my frustrations into words”. **This person had been a client for nine years and represented around \$10,000 in annual billings.** His comment haunted me, and I did a whole bunch of mental replaying attempting to identify why he left. Well, **when I signed up for your program, I decided to include this ex-client just to keep my name in front of him.** As you said at one time, the email gives us access to the person’s inner sanctuary. Well, this person responded to this week’s email with a very short: “when you get a moment, could you call me?” I called and we talked for about an hour. And he is back. **I know in my heart of hearts that it would not have happened had I not been there every week.”**

**- Ron Fassett, CPA**

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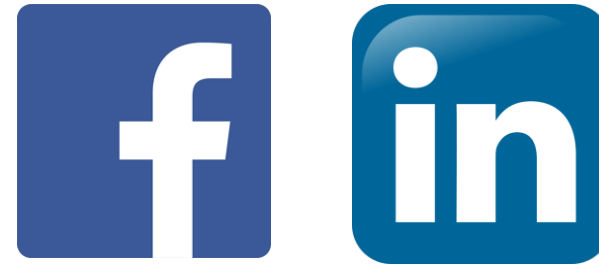






# Social Prospecting

1. Post EVERY Day
2. Target the right prospects
3. Go after engagement first



“Nate and his crew do a great job of keeping up my social media! I’m uneducated on the whole area. **They speak like I do and alert me of clients’ posts.** I’d be lost without them.

**- Lloyd L., CPA**  
**Green Bay, WI**







# Cross-Selling & Ascension

- “Thank you” Campaigns



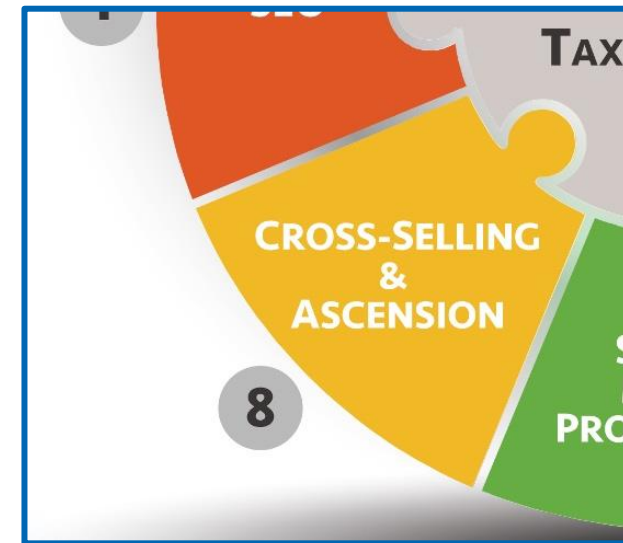
# Cross-Selling & Ascension

- “Thank you” Campaigns
- CONSISTENCY



# Cross-Selling & Ascension

- “Thank you” Campaigns
- CONSISTENCY
- Making Offers





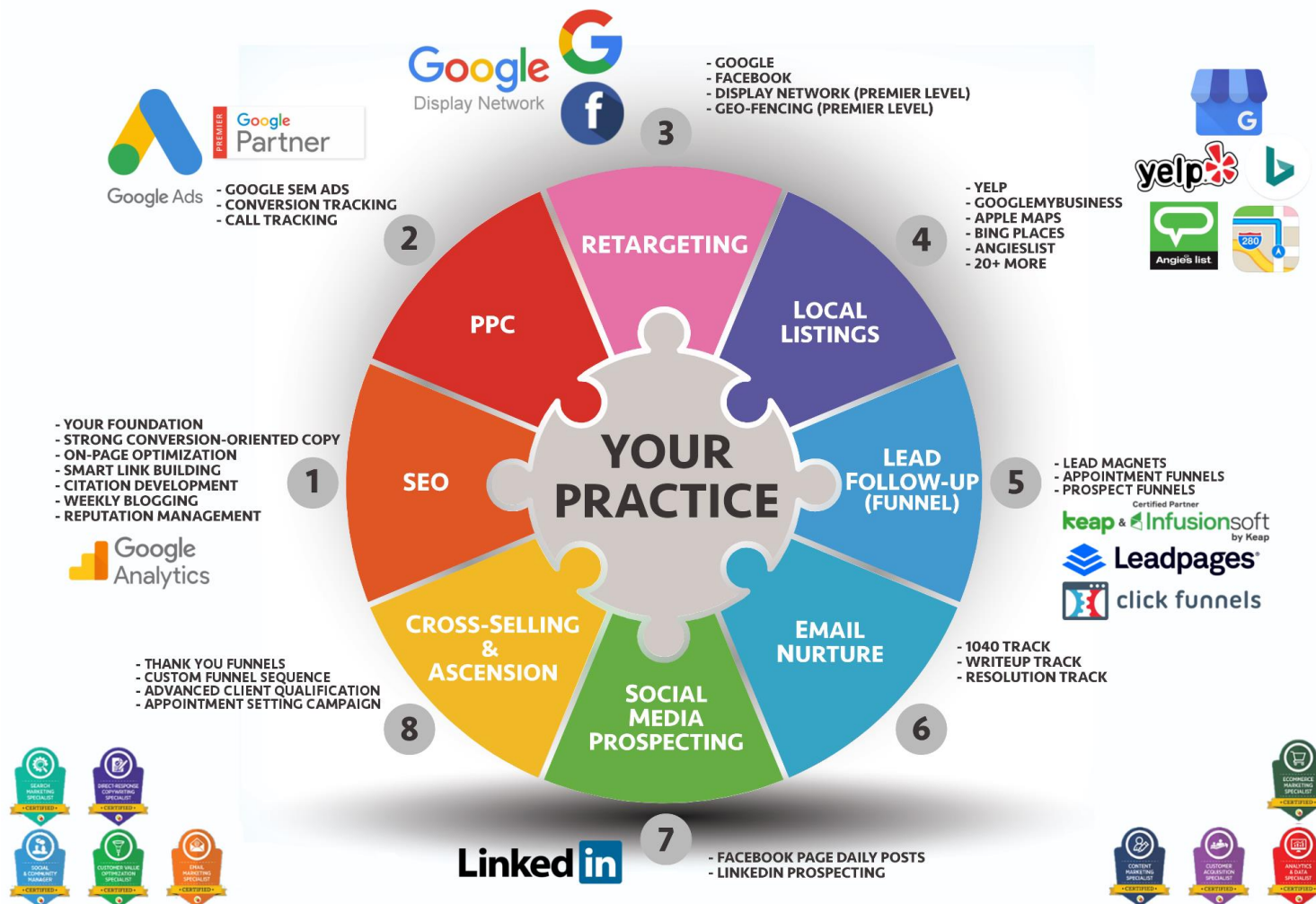
**The most ideal form of online marketing is  
having a system that brings leads through the  
marketing journey:**

**The most ideal form of online marketing is having a system that brings leads through the marketing journey:**

- 1. Awareness**
- 2. Engagement**
- 3. Conversion**
- 4. Ascension**

**... without you having to become a carnival  
barker**

## AdvisorProMarketer **DIGITAL DOMINANCE METHOD**®

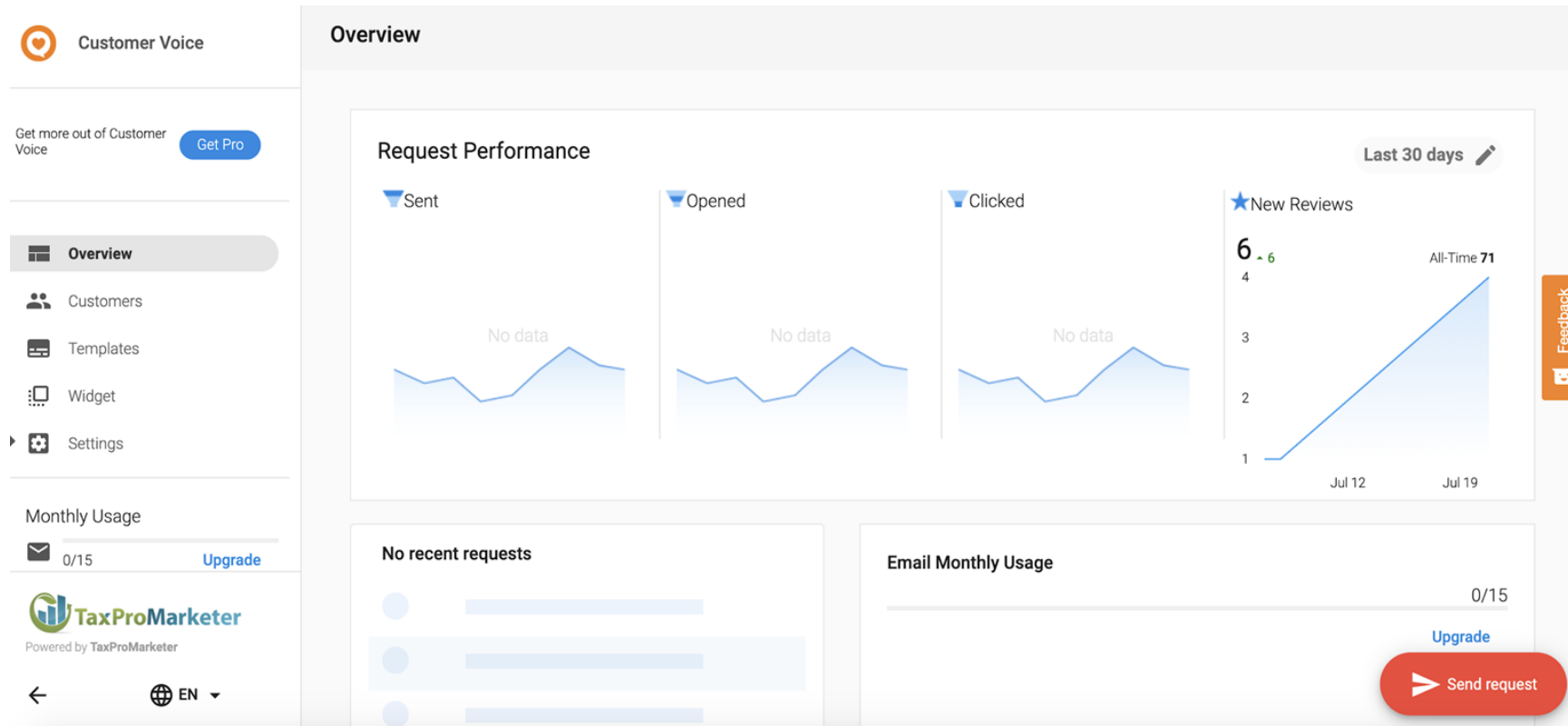


**“We have had more new clients from our machine, this year, than our old website produced in 10 years.”**  
- Ursula Garrett.

# Free Online Analysis + 4 Free Marketing Tools

## 1. Customer Voice

# Free Online Analysis + 4 Free Marketing Tools





# Free Online Analysis + 4 Free Marketing Tools

1. Customer Voice
2. Reputation Management



## Reputation How are people rating your business online?

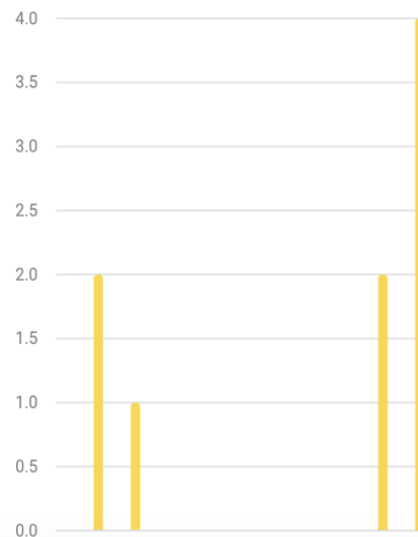
### New reviews

The number of new reviews you've received

6 ▲ 6

Selected date range

Weekly reviews (past 6 months)



### Most recent reviews

All reviews this period



Darrel Johnson reviewed your business on [google.com](#)

Jul 21, 2020



Reliable, professional and thorough. We're very happy with Menden.



jeffrey earl reviewed your business on [google.com](#)

Jul 21, 2020



Roger Menden does an outstanding job each year. I've used his expertise for 10 years. I highly recommend to anyone Menden Tax Services. They are the best. Thank you.



Deb LeMay reviewed your business on [google.com](#)

Jul 21, 2020



We have been going to Menden Accounting for many years. Roger is an excellent tax preparer. He is knowledgeable, ethical, and has always steered us in the right direction to get the most for our money. He is very professional and helpful. He helps us look to the future.



Casey Burns reviewed your business on [google.com](#)

Jul 21, 2020



I have worked with several of the accountants here at Menden Accounting and Tax. All of them are experts in their field, saved me way more money than TurboTax all the while being a quick and seamless meeting. They also handled employee payroll for our family. My mom uses them now, my brother in L... [View More](#)

[Show all \(+2\)](#)

Feedback



# Free Online Analysis + 4 Free Marketing Tools

1. Customer Voice
2. Reputation Management
3. Listing Builder



## Listings Are you listed accurately on search engines, directories, apps, and GPS?

### Google My Business

#### Search types

How customers find your business on Google

3,027 ▲ 768

Selected date range

12 month trend



Listing Builder



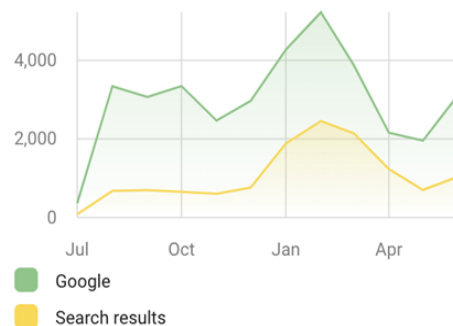
#### Views

Where customers see your business on Google

4,730 ▲ 1,112

Selected date range

12 month trend



Listing Builder



#### Actions

Common actions taken on your Google listing

489 ▲ 157

Selected date range

12 month trend



Listing Builder



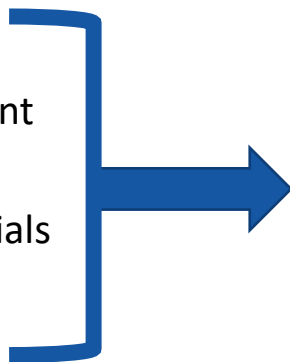
Feedback

# Free Online Analysis + 4 Free Marketing Tools

1. Customer Voice
2. Reputation Management
3. Listing Builder
4. Social Marketing Analysis

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  - Spending Management



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of Monthly Billings for  
**Each** of Your Clients!

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POWER DAYS

# Building Your Online Marketing Machine



A Two Part Webinar:  
Infusing Your Practice  
with New, Ideal Client  
Relationships

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