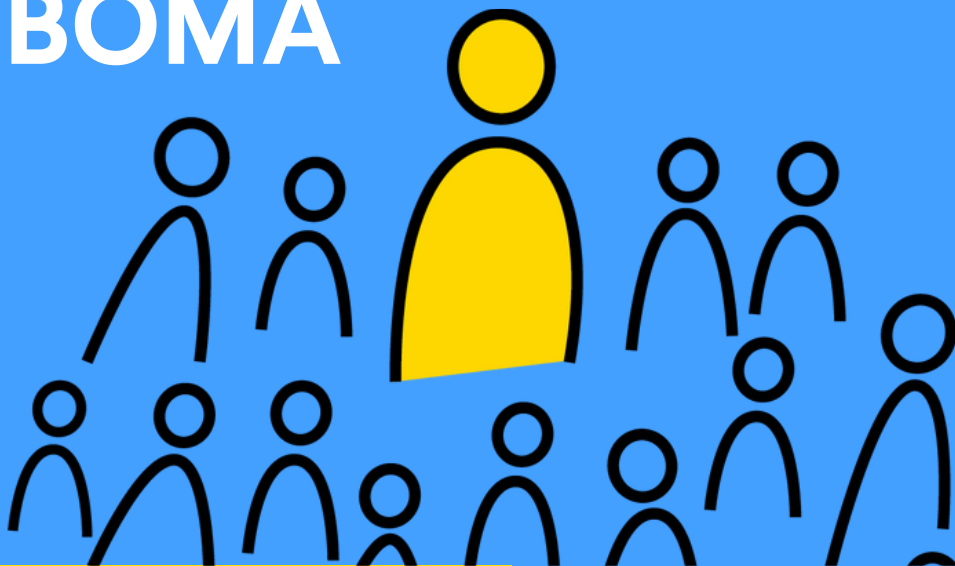


Elevate Your Marketing with BOMA



A fast paced guide outlining the strategies, tactics, and best practices for communicating with clients and marketing your accounting firm.

Scan to Learn More



www.bomamarketing.com

REUNION 2025

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BOMA

1. Welcome.



We're so glad you're here and excited to help you on your journey to digital marketing success.

In today's increasingly media and information saturated world, accountants have a unique challenge: how to adapt their marketing strategies to effectively reach their audience and engage clients.

This booklet will help you navigate the world of digital marketing using actionable tips and proven strategies to help you connect with clients, build lasting relationships, and grow your practice.

Get ready to take your accounting practice to the next level.

2. Why Digital Marketing is Key for Reaching and Engaging Clients.



→ We live in an increasingly digital world and in the fast-paced world of accounting, marketing is no longer a maybe, it's a necessity.

Therefore it's crucial that accountants understand the importance of digital marketing in reaching and engaging both current and potential clients.

Why Digital Marketing is Key for Reaching and Engaging Clients.



The way that people go about looking for a new accountant has evolved, meaning offline marketing isn't as effective as it used to be and you can't just rely on traditional word of mouth.

Having a strong online presence is a crucial component of your marketing strategy, no matter the size of your firm.

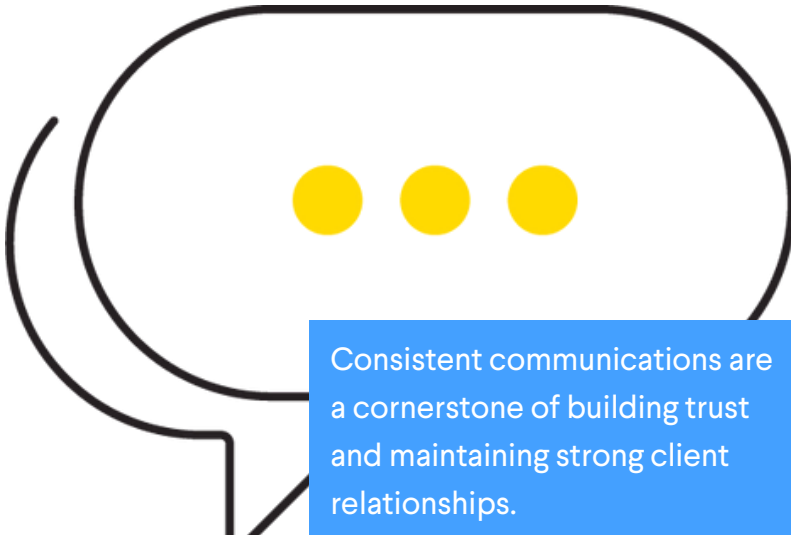
The benefits of digital marketing are vast and can transform the way you connect with your audience.

Unlike traditional marketing, digital marketing allows you to reach a much wider and more targeted audience, helping you to grow your audience and client base.

By targeting specific demographics, you can tailor your marketing messages to resonate with your ideal clients.

This personal touch builds trust and engagement, increases client satisfaction, and ultimately drives business growth.

3. Building Trust Through Regular and Relevant Updates.



- You can harness the power of technology to stay connected with your clients, providing valuable industry insights, sharing relevant resources, and sending personalised newsletters.

By consistently delivering high-quality content, you establish yourself as a trusted advisor, staying top-of-mind for your clients' and fulfilling their financial needs.

Building Trust Through Regular and Relevant Updates.

→ Communication isn't just about what you say. It's about how you say it.

That's why it's important to respond to client inquiries and feedback promptly and professionally.

By doing so, you can show your clients that you're committed to providing them with the best service possible and that you value their time.

Not only will this help you build stronger relationships with your clients, but it will also help you earn their trust and loyalty.

Building Trust Through Regular and Relevant Updates.



In addition, personalised communication is a powerful way to humanise the accountant-client relationship.

Whether it's a birthday greeting, a note of congratulations, or a holiday card, these small touches show your clients that you see them as individuals and care about them on a personal level.

This approach can help you build stronger, more meaningful connections with your clients, making them feel appreciated and understood.

By investing in these relationships, you can create a foundation of trust and loyalty that will help you achieve long-term success in your business.

4. Using Educational Content to Connect.



- Creating compelling content that resonates with your accounting clients is crucial for elevating your marketing efforts and establishing your expertise in the industry.

To achieve this, it's essential to understand your target audience and tailor your content to their needs and interests.

Provide valuable insights, share industry knowledge, and offer practical advice that can help your clients make informed financial decisions.

Using Educational Content to Connect.

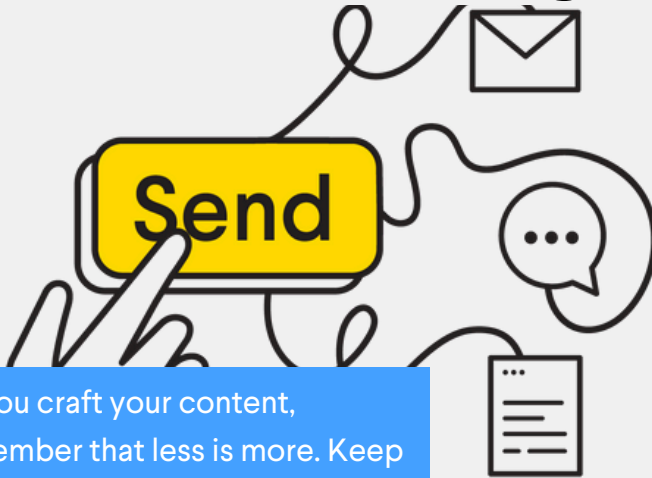
- This can include blog posts, articles, videos, infographics and webinars that offer insights, advice, or solutions to common accounting problems.

Here are some example topics you could provide updates on:

- Government or State changes to business, regulations and tax
- Due dates for GST/FBT/Income tax
- Advisory or Upskilling Events you are running
- Practice changes (new office, new team members, updated branding etc)
- How to guides (Xero/Mileage Claiming/Receipts etc)
- Answers to common Accounting Queries or Mistakes
- Ways to minimise their tax liabilities
- Strategies to grow and improve their business

By consistently delivering high-quality content, you can position yourself as a leader in your field and build trust with potential clients.

5. Tips for Creating Engaging and Informative Messages.



As you craft your content, remember that less is more. Keep it simple and easy to understand.

- Break down complex financial concepts into bite-sized pieces and use clear, jargon-free language.

Bullet points, numbered lists, and short paragraphs can make your content more digestible and visually appealing.

And don't forget to include relevant images, infographics, or videos to keep your audience engaged.

Tips for Creating Engaging and Informative Messages.



With financial information, accuracy is your watchword. So, be sure to triple-check your facts and proofread your content to avoid any errors.

Your clients count on you for reliable and precise advice, so maintaining a high level of trustworthiness is key.

By consistently delivering valuable and accurate content, you can build trust with your clients and position yourself as a leader in the accounting industry.

Remember, your content should be more than just a sales pitch. It should provide value, educate, and help you build a strong relationship with your clients.

When you create content that resonates with your audience, you'll not only attract new clients, but you'll also retain your existing ones, creating long-term loyalty and success for your accounting practice.

6. Leveraging Email and Social Media.



- With people interacting with a plethora of online channels and platforms accountants need to be able to reach and engage their target audience in a variety of ways.

By integrating various channels, such as email and social media, you can create a more comprehensive marketing strategy that will help you get the results you're looking for.

Leveraging Email and Social Media.

→ Email marketing is a powerful way for accountants to maintain relationships with clients and communicate valuable information.

Personalised email campaigns that speak to the specific needs and interests of your clients can significantly increase engagement and conversions.

By using email automation tools, you can streamline your email marketing efforts and deliver timely, relevant content to your clients.

Social media is a powerful tool for accountants to connect with clients and showcase their expertise.

By sharing industry insights, providing valuable tips, and engaging with their audience, accountants can establish themselves as leaders in the accounting industry.

Responding to comments, running targeted social media ads, and sharing content from your website can help drive traffic to your site, generate leads, and expand your professional network.

Leveraging Email and Social Media.

→ By integrating email and social media marketing, you can create a powerful one-two punch that will amplify your marketing efforts.

Promoting your social media content in your email campaigns, and promoting your email campaigns on social media will maximise your reach and ensure that your message is seen by a larger audience.

To ensure the success of your integrated marketing strategy, you should continuously monitor and analyse your performance across different channels.

By utilising analytics tools, you can gain valuable insights into campaign performance, audience engagement, and conversion rates.

This data-driven approach empowers you to optimise your marketing efforts, allocate resources effectively, and achieve your business objectives.

Leveraging Email and Social Media.



Mastering integrated marketing channels is the key to a robust digital marketing strategy that will help you foster client relationships, generate leads, and drive business growth.

With the right approach and a commitment to continuous improvement, you can unlock the full potential of your marketing efforts and thrive in the competitive accounting landscape.

7. Best Practices for High-impact Email Campaigns.



Email marketing is a powerful way for accountants to connect with clients and prospects.



This section will help you create and send an effective email campaign that will capture your recipients' attention and drive them to take action.

We'll cover everything from creating a compelling subject line to segmenting your email list, optimising your design and using persuasive language.

Follow these best practices to ensure your emails are effective and help you take your marketing to the next level.

Subject Line

The email subject line is the first thing people see when they receive your email, and it's what they use to decide whether to open it.

A good subject line is short, attention-grabbing, and relevant to the recipient. Personalisation can also help increase open rates.

Remember to keep it clean and avoid spam triggers so your email doesn't end up in the spam folder.

These triggers include words such as credit, debit, cash, discount, password, free and large attachments or attachments with executable formats such as .exe, .zip and .swf.

The Message

Your email content should be written with purpose. Use language that speaks to your audience and encourages them to take action.

Keep your messages short and sweet, focusing on the needs and interests of your recipients.

Whenever possible, personalise your emails to create a sense of connection and trust.

Your emails should do more than just inform. They should tell a story, evoke emotions, and encourage your recipients to engage with your practice.

Follow these best practices to ensure your emails are effective and help you take your marketing to the next level.

Design

Design is crucial to a positive user experience.

Make sure your emails are visually appealing, easy to read, and optimised for different devices.

Use a consistent design that reflects your brand identity so you maintain a professional and cohesive image across all your communication channels.

Think about adding visual elements like images, videos, or interactive content to make your emails more engaging and help them stand out.

Audience Segmentation

Your email list is made up of a variety of people, each with their own unique interests and needs.

By segmenting your list, you can send more targeted, personalised emails to specific groups of people. This can help you improve engagement and results.

You can segment your list based on a variety of factors, such as demographics, past interactions, or service preferences.

This allows you to send more relevant emails that resonate with your subscribers and make them feel like you're speaking directly to them.

8. Creating an Online Social Presence.



Social media has become a key channel for connecting with clients / prospects and to showcase your expertise.

→ With billions of active users across various platforms, social media provides a unique opportunity to build a strong online presence and foster a sense of community.

To harness the power of social media, you should start by creating a content calendar that maps out the topics you'll cover, how often you'll post, and which platforms you'll use.

Creating an Online Social Presence.

→ This will help you maintain a consistent and engaging presence. You can also use social media analytics to gain insights into your audience, see how your posts are performing, and make adjustments to your strategy.

Now, let's talk about the importance of community. Engaging with your followers is key. It's not just about posting content; it's about creating a dialogue.

Show your audience you're listening by responding to comments, questions, and messages.

This is how you build relationships and demonstrate your commitment to excellent service.

And don't forget about targeted ads. By segmenting your audience based on demographics, interests, and behaviours, you can deliver personalised messages that resonate with your ideal clients.

Contests and giveaways on social media are another powerful tool to spark interest, gain new followers, and boost brand recognition.

Creating an Online Social Presence.

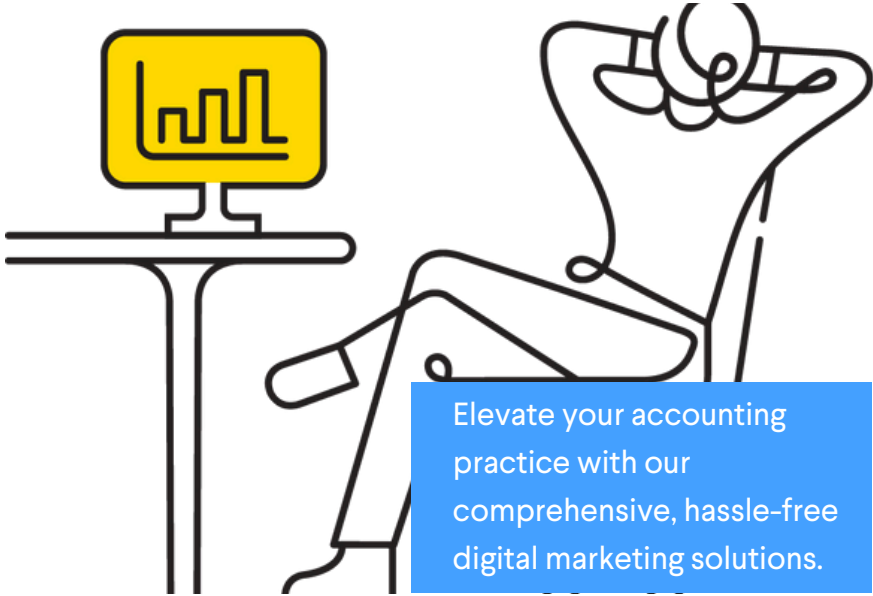


Offering valuable prizes and encouraging participants to share their experiences can create a buzz around your brand and extend your reach.

By embracing these social media strategies, accountants can forge a robust online presence, cultivate a community, and draw in new clients.

BOMA's expertly curated content library ensures accountants can simplify their social media marketing endeavours and attain heightened success in the digital era.

9. Managed Marketing Services.



Elevate your accounting practice with our comprehensive, hassle-free digital marketing solutions.

- Accounting firms often sign up to marketing platforms with good intentions only to find they are unable to fit in the hoped for activity alongside their existing client facing work.

So marketing ends up the 'too hard basket', activity stops and the time / money invested so far is wasted.

Some marketing platforms offer 3rd party marketing services to help businesses with marketing but only BOMA is expert in the field of marketing for accounting firms.

Managed Marketing Services.

→ At BOMA, we understand the challenges of running an accounting firm and therefore offer our managed marketing service to those firms who need someone else to do the heavy lifting for them.

We've crafted exclusive packages to enhance your firm's online presence, ensuring you stay ahead in a competitive digital landscape without having to lift a finger.

BOMA packages can also include SEO optimisation, review generation and BOMA campaign management, leaving you free to focus on what you do best – serving your clients.

Managed Marketing Services.

→ Save Time and Resources: BOMA's done-for-you services save you countless hours, allowing you to focus on your core business activities while we handle your digital marketing.

→ Expert Strategy and Execution: Benefit from our expertise in digital marketing specifically tailored for the accounting industry. BOMA's strategies are designed to maximise your online presence and engagement.

→ Consistent and Quality Content: With BOMA's service, your digital marketing content will always be fresh, relevant, and engaging, ensuring that your firm remains top-of-mind for your clients and prospects.

→ Measurable Results: BOMA's comprehensive analytics and performance tracking provide you with actionable insights, allowing you to see the direct impact of our services on the success of your campaigns and your business growth.

→ To learn more about our managed marketing service packages contact us at support@bomamarketing.com and book a discovery call.

10. Website Builder Service.



Design and build a new website or refresh your current one with BOMA.

- A strong online presence is crucial for businesses, especially for professionals like accountants who are looking to expand their reach and connect with potential clients.

Recognising the need of many accounting firms, either launching or upgrading their website, BOMA offers a full-service website design and build service, designed to help accountants establish a robust online presence.

Website Builder Service.

→ Tailored Solutions: Our website expertise ensures that accountants receive a website that is not only visually appealing but also resonates with their target audience. We create websites that effectively communicate your services and value proposition in the short and long run.

→ You OWN Your Website: Sounds strange, right? But there are some companies that build websites for accountants, don't give you access to the backend, and don't hand the keys over if you cancel your subscription (often at \$200+/mo). With BOMA, you are not held hostage. Your website is yours, forever.

→ Seamless Integration: BOMA's websites come pre-built with BOMA's digital marketing toolkit, allowing you to easily manage your social media, email campaigns, and more. This integration ensures that your marketing efforts are streamlined and effective.

→ Cost-Effective Packages: With BOMA's unique referral structures, clients can benefit from ongoing discounts, ensuring that you get the best value for your investment. Whether you're a new client or an existing one, our packages are designed to provide maximum benefits.

Website Builder Service.

→ Cost-Effective Packages: With BOMA's unique referral structures, clients can benefit from ongoing discounts, ensuring that you get the best value for your investment. Whether you're a new client or an existing one, our packages are designed to provide maximum benefits.

→ Lead Generation: Combining BOMA's done-for-you content with BMR's lead generation tactics is a powerful combination, do more and be better than your competitors at a more competitive rate.

→ Continuous Updates: The digital landscape is ever-evolving. BOMA's website service ensures that your website remains updated with the latest trends, compliance guidelines, and advisory content. Combined with the latest articles from BOMA's content library your website will always stay relevant.

→ To learn more about our website builder service contact us at support@bomamarketing.com and book a discovery call.

11. Why BOMA is the Marketing and Content Platform of Choice for Accounting Firms.



- BOMA is tailored to the unique challenges and opportunities of the accounting industry. This means that you get a comprehensive suite of marketing tools that are designed to help accounting firms succeed.

BOMA's extensive library of content, created specifically for accountants, helps you engage your audience with the right content at the right time.

Why BOMA is the Marketing and Content Platform of Choice for Accounting Firms.

→ BOMA's AI-powered content creation tools make it easy to create custom content that's unique to your firm.

With BOMA, you can create marketing campaigns that resonate with your clients and prospects, helping you build trust and a strong brand.

BOMA's multi-channel campaign management capabilities make it easy to manage and execute campaigns across multiple platforms.

This centralised approach ensures consistency, efficiency, and a unified brand voice, helping accounting firms connect with their audience effectively and consistently.

Plus, BOMA's user-friendly interface and comprehensive training resources make it easy to get started and get the most out of the platform without needing specialised technical expertise.

By choosing BOMA, you're choosing a marketing partner that can help you grow your firm, increase your visibility and establish your firm as a leader in the accounting industry.

Why BOMA is the Marketing and Content Platform of Choice for Accounting Firms.



With BOMA, the possibilities are endless and you can take your marketing to the next level.

Harness the power of BOMA and transform your firm's marketing and client communications today.

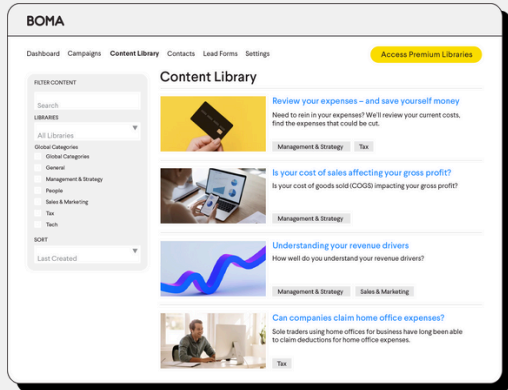
BOMA is the gold standard for accountants, offering a comprehensive marketing solution that seamlessly integrates an accounting specific content library, AI-powered content customisation and creation and multi-channel campaign management.

Experience the future of digital marketing and unlock the true potential of your firm with BOMA. Sign up for a free trial now and discover the power of tailored marketing that drives results.

12. BOMA's Key Features.



Content Library:
Welcome to the future! Country specific articles added weekly so you'll always have great content to share with clients and prospects.



Generative AI:
Content Assist revolutionises email and blog creation. Effortlessly customise and edit articles from the content library or create emails and blogs from scratch in minutes.

Content Assist

How to prepare your business for an audit

Getting ready for an audit is unlikely to be one of your favourite things to do as a business owner. But being prepared, organised and ready can take some of the pain out of an audit.

As your auditor get their job done more quickly, minimal disruption to your staff and business.

...to be ready for an audit.

ur business finances is a mandatory requirement for many companies. The rules and regulations will vary from country to country, but once you're over a certain number of employees, an audit is likely to be required. So, what can you do to make this process easier?

...to be sure to:

relevant documentation - this documentation includes financial statements, bank statements, expenses, invoices and any other documentation that your auditor will need.

documentation in a logical way - the whole picture to complete if your financial data and records are not well-organised. Make it simple for the auditors to find what they need, and ensure there's easy access to all information.

BOMA's Key Features.



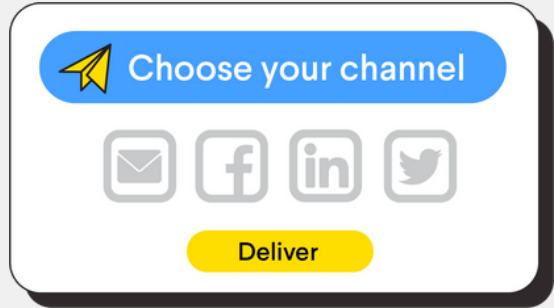
Multi-Channel Campaigns:

All your digital marketing channels in one platform.

With a few

clicks, you can

easily create your own content, or use articles from BOMA's huge content library, and share it via email, social media channels and your website as a blog.



Integrations:

BOMA's

Zapier

integration

allows you to

connect

BOMA with

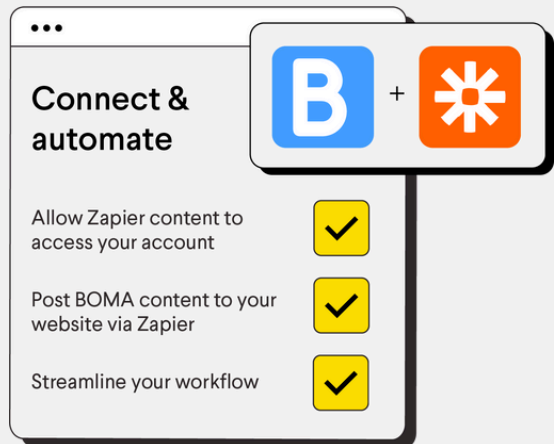
some of the

most popular

accounting

industry apps

so that you can automate the sending of data into and out of BOMA.

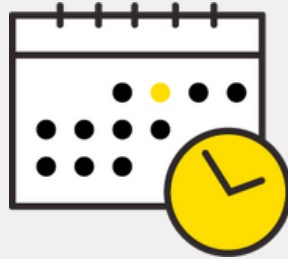


Additional Features.

Email Templates



Campaign Scheduling



Free Image Library



Campaign Analytics



Lead Capture Forms



Manage Contacts



13. What Our Clients Say About Us.

→ *"Boma has been awesome to help me with my email newsletters, blogs and social media content! A platform that is easy to use and they send out the new content often so we know what new information we can post or send to clients. Also the team are really helpful! Cheers Boma team!"*
Stacey Armstrong, Manage My Cashflow

→ *"I am a newby to Boma and I got to say FINALLY there is an easy way to market accounting services. YAY. Thank you BOMA."*
Louise Stodart, Quantum Link

→ *"Frankly I'd be lost without Charles and BOMA. Makes communicating with clients exceptionally easy."*
Janet Xuccoa, Green Lion

→ *"Get into it!!! Boma is SUPER, super easy to use and intuitive, I LOVE IT! It's a timesaver platform for me, incorporating all of our social media (Facebook and LinkedIn) and our newsletter in one platform. Hip Hip Hooray for Boma!"*
Michelle Fox-Bishop, Rural Accountants



14. Contact Information.

Email:

Support@bomamarketing.com

Website:

www.bomamarketing.com

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