

# Leverage Your Brand to Attract the Right Clients



**HEADS UP:**  
**This is an interactive presentation** [  ]



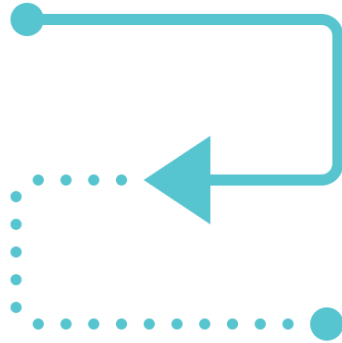
**Think about one of your worst clients –  
someone who frustrates you and waste your time.**



**Now, think about one of your best clients –  
someone you truly enjoy working with.**



**What would life be like if all of your clients  
were similar to your best clients?**



## **GOALS:**

**Build a client profile &  
Identify your differentiators**

# WHO I AM

## Justin Lynch



**10+ Years**  
Branding Experience



**x2 Award Winner**  
AMA Crystal Awards



**Primary Focus**  
Professional Services

# THE PROCESS

1

**Define Ideal Client**

2

**Identify Differentiators**

3

**Update Your Brand**



# 1 Define Ideal Client



# Write down the name of one of your best clients

Leave space to write information about them



# Client Demographics

Age • Education • Income • Occupation • Location



# Client Demographics

## Age Range

- Keep the range within 5 years

## Education

- Highest level of education

## Income

- Household Income
- Primary Income Sources

## Occupation

- Industry
- Title

## Location

- State
- City
- Neighborhood



# Client Psychographics

Lifestyle • Goals • Challenges • Worries & Fears • Why they need you



# Client Psychographics

## Lifestyle

- Day to day lifestyle
- Life challenges they are having

## Goals

- Goals for this year
- Biggest goal they have right now

## Challenges

- What's preventing them from accomplishing their goals?

## Worries & Fears

- Biggest worry they have right now
- What's the consequence(s) if they can't overcome their challenges?

## Why they need you

- What can you help with that they couldn't do on their own?
- What information or expertise are they lacking?



## Client Aversions

Reasons they won't hire a CPA • Reasons they won't hire you

# Client Aversions



## Reason they won't hire a CPA

- What has their past experience been with a CPA?
- What have they tried in the past to solve their challenges?
- What worked, what didn't?

## Reason they won't hire you

- As a business what are your weak spots?
- What information do they not know about you but they should?





## Ideal Services

Which of your services will help them the most?

# Ideal Services



## Top 3 Services

- Pick the top 3 services this client would benefit the most from
- Which of these services are they currently utilizing?

## Service to Promote

- If you had to pick just one service to offer this client what would it be?
- Why?

# RECAP



**Demographics**



**Psychographics**



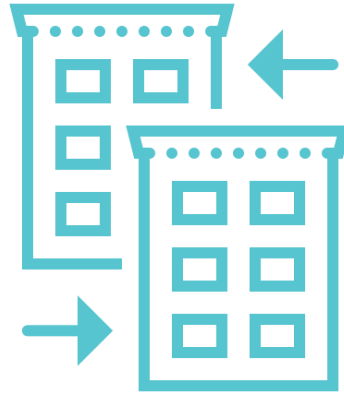
**Aversions**



**Ideal Services**

# Identify Differentiators

# 2



## Differentiators

Are not created... they need to be discovered

# Not A Differentiator

## Accounting Expertise

- This is an expectation

## Great Client Service

- This is an expectation

## Great Communication

- This is an expectation

## Certifications

- Unless it's exclusive or extremely limited

## Innovative

- In what context?
- What does this mean?

# Instead...

## Accounting Expertise

- What fields of accounting do you specialize in?

## Great Client Service

- How do clients feel when working with you?
- What do you do to ensure they feel that way?

## Great Communication

- How do you communicate differently than your competitors?

## Certifications

- What results have you gotten for clients?
- What prestigious awards have you won?

## Innovative

- How are your services different from your competitors?
- Do you have any outside expertise that gives you a unique perspective?



## Places To Look For Differentiators

Find what makes your brand truly unique





# Places To Look For Differentiators

## Client Experience

- Onboarding
- Ongoing communication

## Services

- Unique combinations
- Delivery of the service
- Payment options

## Guarantees

- Deliveries
- Results

## Awards & Recognitions

- Only if these are exclusive and hold prestige

## Niches

- Industries
- Accounting specialities

## Background & Experiences

- Do you (or decision makers) bring an outside view

# Update Your Brand

# 3



## Visuals

Colors • Fonts & Formatting • Imagery



# Visuals

## Colors

- Are your colors conveying the appropriate tone?
- Is your color palette visually appealing?

## Fonts & Formatting

- Are your fonts conveying the appropriate tone?
- Does your text formatting align with your brand's tone?

## Imagery

- Can the client see themselves in the imagery?
- Is the imagery highlighting pain or transformation?

# Visuals Checklist

## Website

- Layout
- Imagery
- Header
- Footer

## Social Media

- Profile Picture
- Cover Images
- Posts Imagery

## Marketing Collateral

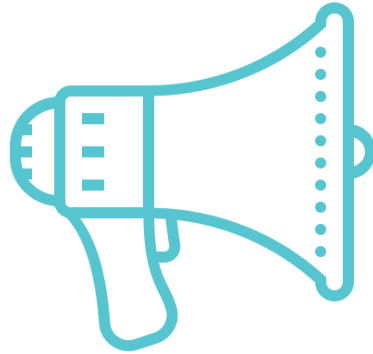
- Business Cards
- Whitepapers
- Letterhead
- Handouts
- Envelopes
- Invoices
- Ads

## Office

- Signage
- Decor
- Name Plates

## Misc

- Email Signature
- Email Newsletter
- Promotional Products
- Apparel



# Messaging

Client-Focused • Story • Tone



# Messaging

## Client-Focused

- Does the messaging talk more about you or the client?

## Story

- What transformation are you selling?
- How will their life change?
- What steps does the client need to take to achieve the transformation?

## Tone

- What overall tone is your messaging conveying?
- Does the tone resonate with your ideal client?

# Messaging Checklist

## Website

- Formatting
- Order of Sections
- Home Page
- Service Page
- About Us Page

## Social Media

- Bio
- Posts Messaging

## Marketing Collateral

- Handouts
- Ads

## Client Support

- Call Greeting

## Misc

- Email Signature
- Email Newsletter



# RECAP

1

**Define Ideal Client**

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**Update Your Brand**



# Questions



# Free Branding Resources

[www.avlier.com/txcpa](http://www.avlier.com/txcpa)