



CASE STUDY

Revolutionizing Growth: How a Southeastern Regional Accounting Firm Boosted Its Pipeline by 300% with Restructured Sales and Martech Investment

A regional accounting firm with over 30 years of experience in providing accounting and tax services to small and medium-sized businesses in the Southeast region of the United States.

The firm had a team of 50 CPAs and advisors and had a strong reputation for providing high-quality services to its clients. However, the firm needed help to grow its business in a competitive market and was looking for ways to improve its sales and marketing functions.

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THE CHALLENGE

The accounting firm was facing several challenges that were hindering its growth. These included:

- Lack of a comprehensive sales and marketing strategy: The firm needed a clear sales and marketing strategy. Its sales and marketing functions were ad-hoc and reactive, with no specific goals or targets.
- Inefficient lead generation process: The firm relied heavily on referrals and word-of-mouth marketing to generate leads. This led to a limited pool of potential clients and made it difficult to scale up the business.
- Limited use of technology: The firm needed to leverage technology to streamline its sales and marketing processes. This resulted in manual, time-consuming processes that were prone to errors.



THE SOLUTION

To address these challenges, I was engaged by the accounting firm to restructure its sales and marketing functions and invest in marketing technology (Martech) to drive growth. The solution consisted of the following steps:

1. Developing a comprehensive sales and marketing strategy: I worked with the firm's management team to establish a clear sales and marketing strategy that aligned with the firm's growth goals. The strategy included a target client profile, a lead generation plan, and a sales pipeline process.

2. Implementing a lead generation program: We implemented a lead generation program that included a mix of inbound and outbound marketing strategies. The program included search engine optimization (SEO), pay-per-click (PPC) advertising, email marketing, and content marketing.

3. Investing in Martech: I identified and recommended using several Martech tools to streamline the firm's sales and marketing processes. These tools included a customer relationship management (CRM) system, marketing automation software, and analytics tools.

4. Restructuring the sales team: You restructured the sales team by defining roles and responsibilities, establishing performance metrics, and providing training on sales techniques and Martech tools.

THE RESULTS

The engagement resulted in significant improvements in the firm's sales and marketing functions, which led to a 300% increase in the pipeline on a YoY basis. The specific results included:

- Increase in lead generation: The lead generation program resulted in a 200% increase in leads on a YoY basis. The program also expanded the firm's reach beyond its traditional referral sources.
- Improved sales pipeline process: The new process led to a 250% increase in the number of deals closed on a YoY basis. The method also improved sales team productivity and efficiency.

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- Better use of technology: The Martech investments led to a 50% reduction in manual processes, which improved accuracy and reduced the time required to close deals.
- Overall, the engagement helped the accounting firm establish a scalable sales and marketing function that will help it achieve sustained growth in the future.

CHAD PERSON

Chad is an accomplished B2B marketing executive with more than 20 years of experience leading marketing and sales initiatives for B2B enterprises with a special emphasis on professional services.

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