

MATTHEW ACCOUNTING

Case Study

Client Situation

Matthew Accounting, CPAs and Business Consultants, is an accounting firm that serves as the “back office” for many types of businesses, including restaurants, libraries, health care professionals, and professional services providers. Matthew Accounting provides specialists in bookkeeping, payroll, and tax preparation and prides themselves on their relationship-driven philosophy.

Client Challenge

Although Matthew Accounting works with specific types of for-profit and non-profit organizations—each with its own set of needs—they lacked a clearly defined marketing message/plan to reach their target audiences. Furthermore, they required a process by which potential clients were recognized, contacted, and placed into a relationship management program in order to grow their client list. Other challenges included:

- A need to move beyond a logo and into detailed and messaged marketing collateral.
- Develop multiple marketing messages for Matthew Accounting's diverse client base.
- Once an organization expressed interest in Matthew Accounting, there were no processes nor materials to promptly respond to each request; therefore, new business was sometimes lost in the follow-up.

Our Solution

PMSI facilitated a brand strategy exercise with key team members regarding their mission, vision, targets, future targets, goals, challenges and needs. This exercise pinpointed the KPIs for the organization and served as a team building experience for the group.

From this exercise, we were able to build a plan to update their collateral materials, reaching their target audience more effectively. In addition, PMSI built an online and inbound plan to continue to both reach the Matthew Accounting targets, but also solicit feedback. This included a system by which their current happy clients were both encouraged to refer back to them and also given the tools by which to do this.

PMSI developed icons and messaging that worked well with multiple targets, yet dovetailed with their overall message.

RESULTS

Results were measured based on target audience, growth, survey and return on investment. After implementing a new response system for thanking referrals, activating the customer management process, building the internal retention roadmap that was easy to execute internally and clearly mapping out a one-year growth plan, the following results were realized:

- An increase of 30 percent in business volume in the targeted areas which was above projections
- In addition to the above-mentioned 30 percent increase, Matthew Accounting grew referrals by 35 percent
- Leave room for another goal to be added here

Kristine and the PMSI team were instrumental in defining our brand, then building a strategy to lead our organization into the future. Their facilitated strategy exercise helped us pinpoint our key performance indicators and brand message, then move forward with a targeted message and plan. Whether brand strategy or strategy overall, their team will save you time, effort, and money and help you grow your business.

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