

YOUR IDEAL CLIENT

MARKETING

STRATEGY



**Bookkeep**   
**Anywhere**

**ROBIN BUCKALLEW, CPA**  
CERTIFIED PROADVISOR, CONSULTANT & FOUNDER

## IDENTIFY YOUR IDEAL CLIENT

*What industry are they in?*

---

*What services do they need?*

---

*Do they have good connections with other clients in the same industry?*

---

*Are they in a profitable industry?*

---

*Other relevant characteristics?*

---

## WHERE DO THEY HANG OUT?

- Facebook Groups
- Networking Groups
- Upwork
- Fiverr
- Instagram
- Pinterest
- Craigslist
- Attending free trainings  
(Bank, SBDC, SCORE)
- Other

## WHO ARE THEY WORKING WITH?

- Bankers
- SCORE
- SBDC
- Niche Experts
  - Tax Preparer
  - Marketing Experts
  - Attorneys
  - Business Coach
  - Technology

## HOW ARE OTHERS REACHING YOUR IDEAL CLIENT?

- Email    Networking    Events    Social Media    Other?

**CHOOSE 1-2 METHODS TO REACH EACH OF YOUR IDEAL CLIENTS.**

*Fill in this marketing calendar to show what daily marketing actions you will take to get in front of your ideal clients.*

**SUNDAY**

---

---

---

**MONDAY**

---

---

---

**TUESDAY**

---

---

---

**WEDNESDAY**

---

---

---

**THURSDAY**

---

---

---

**FRIDAY**

---

---

---

**SATURDAY**

---

---

---

## **WAYS TO GET IN FRONT OF THIS IDEAL CLIENT:**

- Create a profile on Upwork
- Create a profile on Fiverr
- Post an ad for services of Craigslist
- Attend a BNI Networking Group
- Join the Chamber of Commerce
- Local networking events for small business owners
- Teach a workshop
- Referral from local CPA or tax preparer
- Referrals from friends/family
- ProAdvisor Network
- Talk to your local banker for a referral
- Talk to local banks to teach a workshop
- LinkedIn
- Post on your personal Facebook page
- Create a business Facebook page
- Run Google Ads
- Set up your Google Business listing at [google.com/business](https://google.com/business)
- Post on Instagram
- Volunteer
- Attend a trade show
- Attend a conference
- Join a niche specific networking group
- Create a profile on Thumbtack
- Create a profile on Alignable
- Write posts that are relevant to your ideal client
- Ask existing clients for referrals
- Set up a website and add content relevant to your ideal client
- Visit local businesses and drop off your card or brochures
- Email Marketing
- Create a YouTube channel
- Find jobs in Indeed.com that are open to remote workers

## IDENTIFY YOUR IDEAL CLIENT

*What industry are they in?*

---

*What services do they need?*

---

*Do they have good connections with other clients in the same industry?*

---

*Are they in a profitable industry?*

---

*Other relevant characteristics?*

---

## WHERE DO THEY HANG OUT?

- Facebook Groups
- Networking Groups
- Upwork
- Fiverr
- Instagram
- Pinterest
- Craigslist
- Attending free trainings  
(Bank, SBDC, SCORE)
- Other

## WHO ARE THEY WORKING WITH?

- Bankers
- SCORE
- SBDC
- Niche Experts
  - Tax Preparer
  - Marketing Experts
  - Attorneys
  - Business Coach
  - Technology

## HOW ARE OTHERS REACHING YOUR IDEAL CLIENT?

- Email    Networking    Events    Social Media    Other?

**CHOOSE 1-2 METHODS TO REACH EACH OF YOUR IDEAL CLIENTS.**

*Fill in this marketing calendar to show what daily marketing actions you will take to get in front of your ideal clients.*

**SUNDAY**

---

---

---

**MONDAY**

---

---

---

**TUESDAY**

---

---

---

**WEDNESDAY**

---

---

---

**THURSDAY**

---

---

---

**FRIDAY**

---

---

---

**SATURDAY**

---

---

---

## **WAYS TO GET IN FRONT OF THIS IDEAL CLIENT:**

- Create a profile on Upwork
- Create a profile on Fiverr
- Post an ad for services of Craigslist
- Attend a BNI Networking Group
- Join the Chamber of Commerce
- Local networking events for small business owners
- Teach a workshop
- Referral from local CPA or tax preparer
- Referrals from friends/family
- ProAdvisor Network
- Talk to your local banker for a referral
- Talk to local banks to teach a workshop
- LinkedIn
- Post on your personal Facebook page
- Create a business Facebook page
- Run Google Ads
- Set up your Google Business listing at [google.com/business](https://google.com/business)
- Post on Instagram
- Volunteer
- Attend a trade show
- Attend a conference
- Join a niche specific networking group
- Create a profile on Thumbtack
- Create a profile on Alignable
- Write posts that are relevant to your ideal client
- Ask existing clients for referrals
- Set up a website and add content relevant to your ideal client
- Visit local businesses and drop off your card or brochures
- Email Marketing
- Create a YouTube channel
- Find jobs in Indeed.com that are open to remote workers

## IDENTIFY YOUR IDEAL CLIENT

*What industry are they in?*

---

*What services do they need?*

---

*Do they have good connections with other clients in the same industry?*

---

*Are they in a profitable industry?*

---

*Other relevant characteristics?*

---

## WHERE DO THEY HANG OUT?

- Facebook Groups
- Networking Groups
- Upwork
- Fiverr
- Instagram
- Pinterest
- Craigslist
- Attending free trainings  
(Bank, SBDC, SCORE)
- Other

## WHO ARE THEY WORKING WITH?

- Bankers
- SCORE
- SBDC
- Niche Experts
  - Tax Preparer
  - Marketing Experts
  - Attorneys
  - Business Coach
  - Technology

## HOW ARE OTHERS REACHING YOUR IDEAL CLIENT?

- Email    Networking    Events    Social Media    Other?

**CHOOSE 1-2 METHODS TO REACH EACH OF YOUR IDEAL CLIENTS.**

*Fill in this marketing calendar to show what daily marketing actions you will take to get in front of your ideal clients.*

**SUNDAY**

---

---

---

**MONDAY**

---

---

---

**TUESDAY**

---

---

---

**WEDNESDAY**

---

---

---

**THURSDAY**

---

---

---

**FRIDAY**

---

---

---

**SATURDAY**

---

---

---

## **WAYS TO GET IN FRONT OF THIS IDEAL CLIENT:**

- Create a profile on Upwork
- Create a profile on Fiverr
- Post an ad for services of Craigslist
- Attend a BNI Networking Group
- Join the Chamber of Commerce
- Local networking events for small business owners
- Teach a workshop
- Referral from local CPA or tax preparer
- Referrals from friends/family
- ProAdvisor Network
- Talk to your local banker for a referral
- Talk to local banks to teach a workshop
- LinkedIn
- Post on your personal Facebook page
- Create a business Facebook page
- Run Google Ads
- Set up your Google Business listing at [google.com/business](https://google.com/business)
- Post on Instagram
- Volunteer
- Attend a trade show
- Attend a conference
- Join a niche specific networking group
- Create a profile on Thumbtack
- Create a profile on Alignable
- Write posts that are relevant to your ideal client
- Ask existing clients for referrals
- Set up a website and add content relevant to your ideal client
- Visit local businesses and drop off your card or brochures
- Email Marketing
- Create a YouTube channel
- Find jobs in Indeed.com that are open to remote workers