

# BOLD!

Marketing  
Communication for  
Accountants &  
Financial Advisers

BE HEARD.  
BE NOTICED.  
BE SUCCESSFUL.

BE **BOLD!**

[boldcorp.com.au](http://boldcorp.com.au)

p. 07 5477 0197



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**Bold! is known for helping Accountants and Financial Advisers to use marketing to stand out from the crowd, attract ideal clients and grow their businesses. Offering a Do-Able Marketing model that is underpinned by a 7 step Do-It-For-Me (DIFM) marketing framework, we do the heavy lifting while overcoming the issues that typically prevent effective marketing - time, affordability and accountability.**

## Our Approach

While each marketing program is tailored to address our clients' needs, fundamentally our approach is simple. We believe in taking a straight forward yet creative approach that is time and cost effective.

**Our framework has these underlying principles:**

1. People do business with those they know, like and trust
2. Regular, authentic marketing communication aims to RETAIN existing clients and GAIN new clients, and
3. Your marketing communication demonstrates your leadership, ability and desire to help clients to achieve their goals.

## How It Works

We've been around since 1996 and know that there are THREE key issues that prevent business owners and professionals from marketing effectively: **Time**, **Affordability** and **Accountability**. We created the Do-Able Marketing model with a 7 step Do-It-For-Me framework to take the heavy lifting out of marketing.



### Time

We do your marketing heavy lifting so you can get back to work



### Affordability

Built on realistic budgets, this investment in your business pays dividends



### Accountability

Inbuilt reporting that evaluates your marketing performance

## Our 7 Step Marketing Framework Makes Sense

Generally speaking, there are 7 steps in every marketing assignment. Of those Bold! does the four heavy lifting steps while you attend to the other three - Guide; Approve; and Follow-up.

Step 1: **Guide** - we meet with you to understand your brief

Step 2: Develop - armed with your brief we develop your marketing communication strategy

Step 3: Design - once approved we design key marketing resources

Step 4: **Approve** - you formally sign off strategy and key marketing resources

Step 5: Rollout - we implement your marketing communication program for you

Step 6: Report - we provide you with performance reports

Step 7: **Follow up** - you initiate discussion to win new business.

## Five Key Resources



While there are hundreds of marketing tools you can use, we believe your essential marketing kit consists of just FIVE key marketing resources:

1. Memorable Brand (Visual and Brand Promise)
  2. Website
  3. Professional Profile
  4. Business Brochure
  5. Case Study
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## BESPOKE Email Marketing



Bespoke means original and that's the type of marketing communication we prepare for our clients. Our email marketing programs are targeted using content that 'speaks' directly to your ideal clients in language that connects with how they feel about the matters that are important to them.

We manage the entire process from writing articles and preparing content, to rolling it out and reporting on each email's performance.

## SOCIAL Media Strategy



Consistency and relevance are the keys to all successful marketing activities, and this is especially true for your social media strategy. While it's easy to like this and share that, our approach is strategic. We make the most of your bespoke content to differentiate and truly claim your space as a leader in your field and your place in the community.

## Accountants and Financial Advisers



It all started with our own accountant (around 20 years ago) and ever since we've built a reputation for helping accountants and financial advisers to use marketing to grow their practices. We even wrote a book about it.

## COMPLEX Products & Services



While our services are not exclusive to any particular industry, the truth is, Bold! has a talent for helping firms with complex products and services. If you have a product or service that requires a more 'thoughtful' approach not just razzamatazz, please give us a call.

## About Us

We're a small but effective team of experienced marketing professionals who have old-school values and new-age thinking.

We describe our work as 'creative, practical & authentic'. It's a philosophy that resonates with our clients as it demonstrates our commitment to building brand value and resources with a long shelf-life.

We like efficiency and we deliver on schedule. We understand you are busy, so we only meet when needed, otherwise you'll hear from us by phone, email or video call for your monthly marketing 'accountability' meeting.

We work across many different industries and we won't shy away from complex products and services.

We ask our clients to enter into agreements, both for short-term assignments and longer-term marketing. We like clarity, and agreements ensure there are no misunderstandings so that we may deliver on our promises and make the difference you expect.

We believe we perform at our very best when we are considered part of your team, rather than a contracted outsider.



Copy  
Writing

Marketing  
Communication

Web Content  
Writing

Website  
Design

Social  
Media

Graphic  
Design

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## Here's What Our Clients Say...

### **Maddy Briscoe**

#### **PY Accountants & Business Advisos**

"With an annual marketing package, I can relax knowing that we have the benefit of their marketing expertise keeping our program going, keeping us accountable to communication timeframes, and keeping our content fresh. And on top of that, they are just a genuinely awesome people. I cannot recommend Bold! highly enough!"

### **Brett Cribb, Founder & Director**

#### **Resources Unearthed / Stratus Financial Group Brisbane**

"I truly believe our marketing program played a key role in facilitating an approximate 12-fold return on our investment (ROI). This was the step change we were looking for."

### **Ashley McGuirk, Managing Director**

#### **Core Business Accountants, Birtinya**

"While the marketing reports and positive comments from clients and COIs indicated our marketing has us top of mind, we can also directly attribute new clients to our marketing program. Our professionally styled brand, website, professional profiles and client case studies all contributed to a process which led to an introductory meeting for accounting and business advisory services for a significant business enterprise."

### **Phillip Dibben,**

#### **Financial Services SA, Director**

"Working with Bold! is based on building relationships with people, not just service providers. There's no box ticking, they took the time to get to know us and our business. Filling an article brief is as much about making sure our voice comes through as it is about the information being (very thoroughly but succinctly) covered. Would we recommend Bold! to others? We have and will continue to do so."

### **Shane Kouros, Director**

#### **Make Cents Accounting, Sydney**

"I can look back and think "wow" this is so good, and I loved working with Bold! to achieve an outcome that I would not have had if I tried to do it myself. The investment into the marketing rollout is well worth it."

## Contact Us

### **For further details please contact:**

Wendy Bold

p. 07 5477 0197

Email: [marketing@boldcorp.com.au](mailto:marketing@boldcorp.com.au)

