



# How a Custom App can make Marketing, Tracking Prospects and CRM, Child's Play

Mike Page



**Mike Page**  
Head of Product  
Management and  
Customer Experience  
Strategy  
My Firms App

## Biography

*Mike Page is Head of Product Management and Customer Experience strategy at MyFirmsApp ([www.myfirmsapp.co.uk](http://www.myfirmsapp.co.uk)), developers of the largest global App platform for accountants and bookkeepers.*

*As a qualified accountant, Mike has come to appreciate the challenges faced by the profession in a world where always-on clients are demanding instant answers and he firmly believes that App-driven technology can help put accountants at the heart of their clients' mobile lives.*

*As App stacks and App Add on Communities grow, the role of MyFirmsApp as the leading App integrator for accountants will become increasingly critical. His goal is to put an App in every accounting firm in the world.*

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**Paper type** Opinion

## Abstract

*As the accounting profession prepares for the coming decade, there's a confident realization that clients are demanding more and technology can drive better ways of working. Accountancy practices using the right tools to streamline their businesses can benefit from an improved client service, better working partnerships, and a smoother running practice.*

## Introduction

In today's mobile world, the Smartphone is the 'glue' that binds people, information, businesses and customers together. Mobile internet access has soared in recent years and 80% of smartphone users check their mobile devices within 15 minutes of waking up each morning according to research by IDC. With this rise in mobile internet users and a decline in email open rates, accounting practices are looking to different communication channels to get their messages heard and branded Apps provide a ready solution.

Clients are leading the way and requesting more digital interaction as they don't want to wait days for paper documents to arrive in the post or for an email to come through with the answer to a question that could be easily resolved with an instant message or automated response.



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*Analysis*

### **Apps – a vital role in the marketing mix**

An App for an accounting firm allows the brand to become more pervasive and in the new 'post GDPR' world, the App can play a vital role in the marketing mix by helping to collect and verify data, in gaining opt in permissions, sharing privacy policies and in storing and managing key data. It makes sense that someone who has installed an App will be more receptive to communication and it makes it easier to adopt a more personalized approach to reach out to prospects and clients.

They can certainly help with one of the greatest marketing challenges facing accountants: new business generation. In a recent poll we found that 64% of accountants ranked this as their biggest marketing related problem with them saying that they struggle to find the time to market their services when there are so many other priorities fighting for attention.

Being able to message within an App that the client has chosen to download makes marketing easier and with the growing threat of scam emails pushing all professional firms to find more secure ways of communicating with their clients, an App also offers a more trusted method for interaction.

### **Push notifications can be generated automatically**

These 'Push Notifications' are created easily and if the accountant wants to opt for doing nothing at all, they can be generated automatically using Automated Client Engagement (ACE). These instant messages are sent to the client's Smartphone and our research shows that they have a 93% open rate, and this occurs, typically, within minutes of delivery. They provide an opportunity for firms to automate the distribution of content, ranging from reminders about tax deadlines to news on services.

Push notifications provide the perfect solution to some of the most common communication challenges:

- Struggling to get clients to engage at the right time to give them the right advice;
- Value is often lost by having conversations with clients that are not informed;
- Accountants are extremely busy and don't have the time to manage and engage with clients as much as they should; and
- Clients expect their advisors to digitally engage with them in the way that they want, need and expect.

### **Tracking creates opportunities**

The ability for Apps to track which tools and services clients are using creates opportunities for the firm to respond more quickly and appropriately. If a client has opened the accountant's App to work on one of the calculators or has filed a receipt, it automatically sends out a notification from the accountant to the user's phone, offering further support and details of how to get in touch. The accountant can fully tailor the content of the messages and switch off any notifications that they do not want clients to receive.



The new automated client communication feature ensures that all communications are relevant and includes pre-crafted messages by marketing specialists that are designed to drive the right level of contact with clients. Used in this way, digital technology can play an important role in enhancing the client experience.

### **Website prompts prospect to download App**

For those accountants who are uncomfortable with the notion of actively 'selling' their services, those firms that have their own App benefit from a powerful Call-to-Action (CTA) to download the App when an Android or iPhone user visits the website. A pop-up box appears that says: "We notice that you are using an iPhone, why not download our latest App here". It's an effective way of letting clients and prospects know about the App and encouraging them to try it.

An App can also support firms that want to use word of mouth as a source of customer development with a 'Refer a friend' feature that can be used to generate new business and to track the progress of referrals.

By improving the efficiency and effectiveness of the firm's communication and marketing with new and existing clients, custom Apps can be used to facilitate client acquisition, collaboration, engagement and retention, and build brand strength. It will also cement the firm's role as a trusted and authoritative adviser to business – and position it as an innovator.

### **Apps help in GDPR compliance**

Since the introduction of GDPR in May 2018, one of the new challenges facing accountants is how to manage GDPR compliance. Every firm with an App has its own 'Accountant's Control Panel' and this ensures that all valuable contact data held by the App is totally secure and it is possible to restrict access to selected members of the team. If a user wishes to be 'forgotten' then they can simply delete the App from their device and notify the practice that they do not wish to be contacted again. All their contact information can be easily removed from the control panel and a complete audit trail is available to demonstrate these actions have been completed.

As the App inherently works on an 'opt-in' basis, clients have to choose to download it and this opt-in theme continues with an option to receive push notifications. Push notifications can also be segmented so that relevant messages are sent to selected prospects and clients and those that download the App are given the choice of opting-out of certain preferences.

Being able to send a message directly to someone's mobile device is a privilege and those firms that have an App have an inherent advantage over those that don't. From the marketing perspective, an App makes marketing child's play, giving the accountant permission to talk to clients at any time and giving them insights on their habits and preferences that the traditional marketing channels just can't access.