

Clear Vision Accountancy Limited

Marketing Support Services



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Meet Our Marketing Specialist



Dee Gerrish MCIM PGDip

A skilled marketer, business development specialist and project manager, Dee Gerrish has worked in marketing for over 20 years.

She has supported Clear Vision Accountancy's clients with their marketing, alongside her internal role as Business Development and Marketing Manager, since 2004. She has helped a multitude of business owners to target their marketing efforts, generate and convert new customers. Her approach is straightforward and down-to-earth, always focusing on low-cost opportunities first.

This guide summarises the areas of support she provides to Clear Vision clients, who benefit from:

- A fixed, discounted monthly support cost
- Working with Dee as much or as little as they need
- Prioritised time spent actioning their tailored marketing plan
- Ongoing access to a marketing specialist, without the need to add to their wage bill
- Development of the internal marketing capabilities in their business where required

You can call Dee on 01249 712074 or [email her](#) for a friendly, informal chat about your marketing requirements. There'll be no obligation to engage her for paid work, just a positive, forward-thinking discussion on your needs, full of 'quick wins' for you.

Get Your Marketing Foundations Right

Your Marketing Persona(s)

Every successful building project starts with the right foundations. It's the same with your marketing.

To make sure your marketing pays off, you need to be clear on who you're marketing to, how you help them and why they choose you.

Dee uses a proven three-step process to help you create unique marketing 'personas', which are semi-fictional portraits of your ideal customers. These capture the backgrounds, motivations and behaviours of the people you seek to serve.

You can then use this information to adopt a focused, more effective marketing approach which strengthens and grows your business.

This support is for you if you:

- Spend a good deal of time and money on your marketing for little results
- Aren't sure of where to start to make your marketing pay off

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“Your input in improving the profile and customer experience for my business/clients was both useful and thought provoking to increase potential enquiries and website traffic.”

Andrea Catley
Director, Geoffrey Smith Estate Agents Limited

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“Dee has provided great advice; is very responsive and has great attention to detail.

In a short time, we have been able to make a number of changes to our regular marketing activities which can now continue on an ongoing basis.”

Ketan Shah
Owner & Principal Dentist, Brightside Dental

Build on Your Foundations

Dee helps you align your marketing strategy and activities with your ideal customer persona(s). The result? Marketing activity that pays off.

Content Planning

This service brings together your ideal customer and the buyer's journey, to create a content calendar that delivers the right content, to the right people at the right time.

This support is for you if you:

- Find yourself sweating over new ideas for marketing content
- Need your content to hit its mark
- Want to know how you can use your previous content rather than it going to waste

Website Review

Your website is your marketing 'hub'. It's your 24/7 shop window. It therefore needs to reflect how your business is now and speak to your ideal customer.

Dee offers a complimentary website review, delivering a report which highlights its strengths and weaknesses and her recommendations for improved results.

Following this, her support depends on the findings and how you'd like her to get involved. She can help you enhance your existing site or create a website brief for a new site and help choose a designer to create it for you.

This support is for you if you:

- Consider your website to be a key marketing tool
- Have an underperforming website which has become out-of-step with your business
- Are looking for your website to generate direct new leads for your business

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“The messages on our old website were out of step with who we wanted to target. Dee was the ideal person to recreate the messages for us. She worked with me to understand our key differences and company values.

We now have a website that truly reflects our business, our people and our values.”

Ben Hellyer
Managing Director, Kristek Precision Limited

Social Media Strategy

Dee helps you define the key goals for your social media channels, so your activity is meaningful and consistent. She will support you, or a chosen team member, to establish a productive social media presence. She can also manage your social media channels for you.

This support is for you if you:

- Know you should have a social media presence but don't know where to start
- Spend time on your social media without seeing much return
- Have old social media channels you have abandoned

Copywriting, Editing & Proofreading

A trained copywriter, Dee can help you define your marketing 'tone of voice' and create copy that attracts your ideal customer.

She is also an experienced copyeditor and meticulous proof reader.

This support is for you if you:

- Are not a confident writer
- Need an external eye to sharpen up your writing
- Need to know your marketing content is error free and visually appealing

Branding

A session to discuss your current branding and the actions required to make it:

- Reflect your business as it is now, what it does and for whom and/or
- Consistent across all marketing channels.

Includes the creation of a 'Brand Bible' for the business to follow and accompanying action plan to achieve brand consistency.

This support is for you if you:

- Can't remember when you last reviewed your brand visuals and messaging
- Have branding which is tired or out-of-step with your current business

Convert Your Ideal Customer

Sales Funnel Management

Dee shares a visual tool that tracks where your leads are in the sales process. You can then use this tool to ensure your sales team systematically follows up the leads.

This support is for you if you:

- Need to know where your new business leads are coming from
- Lack clarity on where your leads are in the sales process
- Lack sales lead ownership and accountability in your business

Customer Onboarding & Retention

Dee helps you manage this all-important first stage of the customer journey to create a positive and remarkable experience.

This is accompanied by the development of customer contact programmes which increase customer retention and the cross sale of additional products/services.

This support is for you if you:

- Struggle to keep new customers
- Seek to reduce your marketing spend
- Need to improve customer perception of your business

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“Dee always has good ideas and looks at situations from a fresh approach.”

Simon Tucker
Owner, Profitable Conversation

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“I found the marketing support service so helpful and timely. Highly recommended and thank you Clear Vision for the opportunity.”

Cath Freestone
Principal, Smile Hub

Enhance Your Customer Experience

Mystery Shop (B2C businesses)

A great standalone exercise to kick off the enhancement of your customer experience. Dee will call your business and/or your business's closest competitors, posing as a potential new customer.

Includes a full report comparing the quality of the first contact between each business.

This support is for you if you:

- Would like insight on your existing/new competitors' customer experience
- Need to gauge whether your prices are at the right level
- Seek the confidence to raise your prices

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“I would just like to thank you for all the hard work you have put into our recent request for help re: the telephone manner of our staff.

The Mystery Shop reports were extremely thorough without being judgemental. From start to finish we were handled extremely professionally and we would not hesitate to use you again or recommend you and your services to others.”

Sue Craske
Business Manager

KPI Maximisation

Dee's support to measure and improve the everyday activities that drive your financial results and enhance your customer experience. Using a tried and tested measurement format, she helps you produce a monthly one page report that keeps the whole of your team focused on maximising your business performance.

This support is for you if you:

- Have untapped growth potential in your business
- Need to work on your customer retention
- Are looking to outshine your competitors

Project Plan

As much or as little of Dee's support as you need to keep your team accountable and moving forward with the project plan that arises from the above customer experience review.

This support is for you if you:

- Struggle to keep your team accountable for agreed actions and key projects
- Would benefit from an external person who follows up with your team
- Want a central plan to track the progress you are making on your key projects

Customer Feedback

Dee's support to gather, collate and present feedback from your customers.

This support is for you if you:

- Lack up-to-date customer feedback
- Would benefit from an independent person capturing feedback from your customers

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“When it comes to marketing, it has been great to get Dee's feedback on the campaigns and initiatives that we are planning.

Often her advice has helped us to rethink our approach and also allowed us to develop new ideas.”

Sunil Passan
Principal, Northlight Dental

Marketing Champion Course

Six 90-minute Zoom sessions to develop an in-house marketing champion who can plan the appropriate marketing content, manage your social media channels and grow your marketing list.

The six sessions Dee will cover (see above for details):

1. Develop your marketing personas
2. Content strategy
3. Repurposing content
4. Social media management
5. Grow your marketing list
6. Manage your sales funnel

This course also includes ad hoc help and advice between Zoom sessions, to ensure your team member is able to action the learning points.

This course is for you if you:

- **Want to develop your in-house marketing capabilities**
- **Have a keen, capable team member with the interest and capacity to learn about these fundamental marketing areas**
- **Need the support of an experienced marketer to achieve these aims**

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“Dee Gerrish was an absolute pleasure to work with. She is very efficient and responded quickly and flexibly to our varied and varying demands. I would not hesitate to recommend her.”

Robert Craven
The Directors' Centre Limited

Other Services

Business Plan

The preparation of a professional, comprehensive business plan to aid internal focus and/or support external applications for business funding.

Dee takes a consultative approach to understanding your goals and conducting supporting research. She also provides plan drafts for your review at key points in the process.

This service is for you if you:

- Are looking to formalise your business plans
- Need to produce a credible plan with which to approach your bank or other external funder

Dee Gerrish MCIM PGDip

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