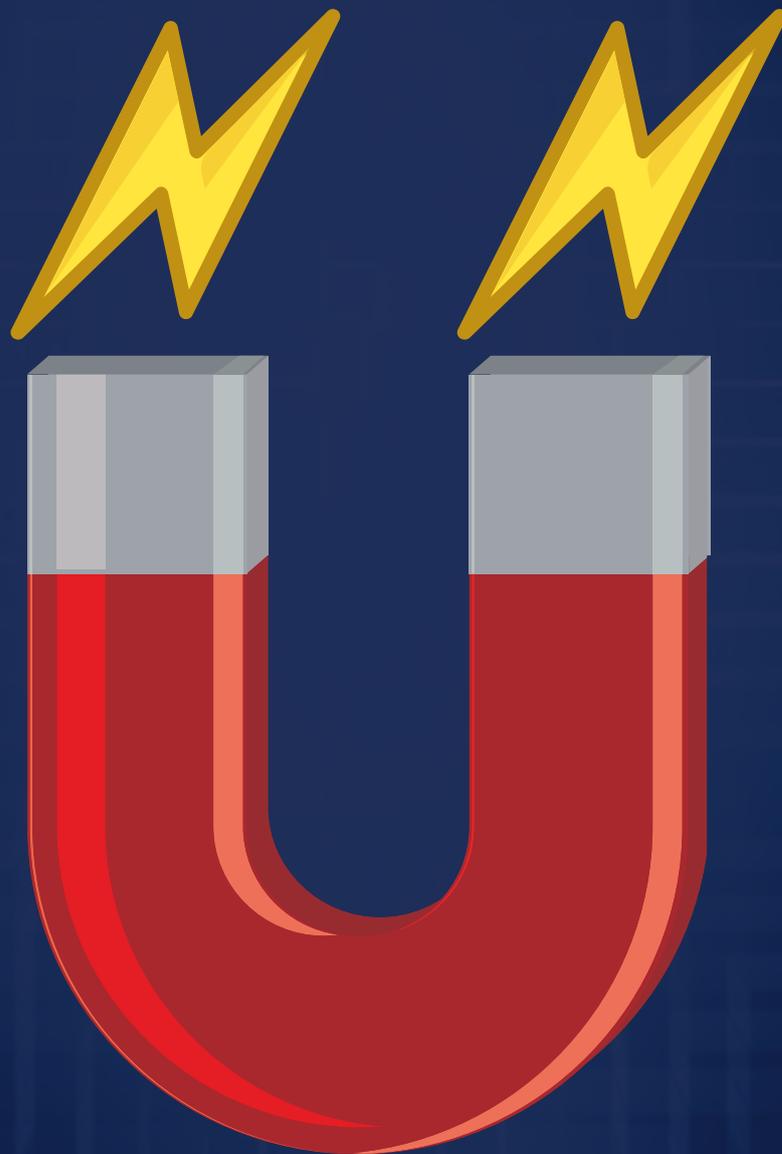


FOUR KEYS
TO CREATING A
POWERFUL LEAD
MAGNET TO ATTRACT
YOUR IDEAL CLIENTS



BY SALIM OMAR, CPA

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ABOUT SALIM OMAR, CPA

“Let me remove the roadblocks to your success and show you how to fall in love with your CPA business all over again.” – Salim Omar



I'm not a guru. I'm a CPA practitioner just like you...

I've spent nearly 20 years uncovering the keys to marketing success of any CPA firm. I've used my financial expertise as a Certified Public Accountant and drawn from the challenges I encountered in the early years of starting my CPA practice to understand the success principles that create CPA firms that are profitable, respected, and fun for their employees.

My experience as a former Chief Financial Officer gives me the unique ability to understand what your clients are looking for in a CPA. I've put pen to paper to capture my experiences in business, writing *The Ultimate CPA Practice in the New Economy* and articles in such prestigious professional publications as *Accounting Today*, *The CPA Journal*, *Financial Advisor* and *Wealth Manager*.

For the past 5+ years, I have been passionately involved in helping my accounting and tax colleagues create their dream lifestyle practice.

Four Keys to Creating a Powerful Lead Magnet to Attract Your Ideal Clients

If you want to attract a steady stream of new clients, you need to build a strong list of prospects who are interested in the services you offer.

However, these days people are very protective of their personal information and they are not just going to give you their details without something useful in exchange.

Usually the process for doing this is having a place on your website where you offer people something to encourage them to give you their contact details – such as a free report or resources such as checklists.

Whatever you offer needs to be relevant to your practice and perceived as valuable by your prospects. You should then promote this actively so that you capture the contact details of as many ideal clients as possible.

This offer is often referred to as a Lead Magnet as it is designed to attract people to join your list and become leads.

The advantages of getting this right include:

- Helps you attract more of your ideal prospects as subscribers.
- Positions you as an expert in your chosen field of expertise.
- Provides value to your prospects who sign up to your list and therefore makes them feel positive towards you.
- Builds trust as you are seen to provide something worthwhile.
- Begins a relationship where people get to know you quicker and look forward to hearing from you again.

So let's go through the stages of creating and promoting the right offer so that it becomes a powerful "magnet" that attracts your ideal prospects and clients.

The steps we'll go through to help develop a powerful Lead Magnet are as follows:

1. Focus On the People and the Problem
2. Choose a Title and Format
3. Create the Content
4. Maximize Attraction

LEAD MAGNET KEY #1: PEOPLE AND PROBLEM

As we've discussed, effective marketing has to be focused on a specific group of prospects who want to achieve a particular outcome or solve a problem.

From what we've discussed already, you should know who you want to target. You will also have identified their key problems. In order to offer a Lead Magnet that appeals to your target audience, you want to narrow this down as much as possible. You don't want to offer something that tries to solve too many problems for too many people. You should either focus on a very specific group of people e.g. small business owners, dentists or lawyers or choose a very specific problem they want to solve.

For example, one of the reports which I use is entitled "Legally Slash Your Tax Bill By Up to 62%" and is aimed at small business owners. That is targeted but is still quite a broad group. However, it focuses on addressing one specific issue – cutting taxes. It is therefore targeted to the people I want as my clients and deals with a problem I can help them solve.

Some examples of problems your prospects have that you might address are:

- Paying too much tax
- Cash flow worries
- Too many outstanding debts
- Worried about tax inspections
- Want to sell the business
- Overheads too high

To get started creating your Lead Magnet, don't worry yet about the format, the title or the detailed content. Just focus on who is your Lead Magnet for and what key problem(s) it helps them address?

Once you've decided who it's for and what it's about, you are ready to go on to the next step.

LEAD MAGNET KEY #2: TOPIC AND TITLE

The next step is to turn the problem round and offer them a solution to the problem.

So, for example, you might turn the examples above around so that you are providing a solution rather than simply reporting a problem:

- ▣ Reducing taxes
- ▣ Improving your cash flow
- ▣ Reducing unpaid debts
- ▣ Avoiding tax inspections
- ▣ Preparing your business for sale
- ▣ Reducing overheads

The next step is to decide how best to present your solution. This will show you how to structure your Lead Magnet.

There are several possible approaches to choose from. We'll take the example of "Improving Your Cash Flow" to show how it would work using three possible approaches.

Please note that you are not choosing the title yet – though following these approaches should make it easy for you to come up with a title.

- ▣ **Steps:** With this approach, you show people what they need to do to get a specific result. You simply identify the steps needed and then add in the details of what they need to do.

"7 Steps to Better Cash Flow."

- ▣ **Questions Answered:** Here you would usually come up with a list of the questions you are most commonly asked and build your content around these.

"Your Questions About Cash Flow Answered."

- ▣ **Mistakes:** This is based on common mistakes you see people making.

"7 Big Mistakes That Lead to Cash Flow Problems."

Whichever approach you choose, you generally want your Lead Magnet to provide information that is "useful but incomplete". That means people should find it valuable in its own right but they will also benefit from getting further information from you.

If you give them too much information, they won't need your help. If you don't give enough, they will not value what you offer.

The idea of this type of report is that you can demonstrate your knowledge and expertise by providing an overview of the solution – or more details in a specific area.

Your reader gets enough information to get started but will stay in touch because they will also need further information.

Your job here is to show them that you deliver great value – whether in your free information or paid-for products and services.

Now your Lead Magnet is starting to take shape and it's going to be extremely useful to your target market. So you have to make sure they want it. One of the keys to that is giving it a great title.

The title can be simple or it can be wacky but it needs to make people want it.

If you have used one of the above approaches, you already have the basis for a great title. But you may want to jazz it up to make it even more appealing.

A good title will:

- Grab attention
- Arouse curiosity
- Create a desire to learn more
- Address an issue that concerns the reader
- Be Specific: “Improve Cash Flow in Five Days” is much better than “Improve Your Cash Flow.”

You could even come up with a really catchy title and use the ideas above as potential sub-titles. You can also combine the different approaches.

Here are some example titles based on this process:

- 1.** *Secrets of Better Cash Flow: How to Ensure You Always Have the Funds You Need*
- 2.** *27 Ways to Improve Your Cash Flow Overnight*
- 3.** *The Ultimate Guide to Better Cash Flow: Five Vital Secrets Your Bank Doesn't Want You to Know*
- 4.** *The Top Cash Flow Mistakes and How to Make Sure You Don't Make Them*

LEAD MAGNET KEY #3: CREATE THE CONTENT

Once you have decided the topic and approach to your Lead Magnet, you need to decide how to present it. There are various possible approaches such as PDF reports, checklists and tools such as spreadsheets or downloadable video or audio.

You might want to look around at other websites – both in your own market and in others – to see what others are offering. The fact is the better your Lead Magnet, the more chance there is that people will sign up.

Often the best approach is a simple short report created in PDF format that people can download from your website after they sign up.

For many people, the scariest part of creating a Lead Magnet is adding the actual content, whether you're writing words that will be read or creating the ideas for a spoken presentation.

The great advantage of the approaches we've outlined here is that it enables you to organize your ideas following a structure such as steps, strategies or secrets and so your content virtually creates itself.

Before you actually start writing your content, you'll want to write a very simple outline.

When you have this in place, you'll simply “fill-in-the-blanks” to complete the report.

The best way to start is by creating obvious sections.

These may be your steps, secrets, tips, questions, mistakes or whatever you have decided on.

A good rule of thumb is usually to have between five and 10 sections but the right number depends on what's needed to get the information across.

Some people find it's useful to do this simply as bullet points. Others like to use a visual approach such as a mind map.

Now, you've actually done the hardest part of the work! All you have to do next is start filling in the blanks.

I know this step can seem a bit intimidating – especially if you are not confident in your writing skills – but it is likely to be much easier than you think.

Some people like to record this, others prefer to write – and either way you can have someone else edit it if you prefer. The amount of extra content you'll need to add depends on how long you want your report to be. However, if you've structured it the way I've suggested above, you'll just need to write a paragraph or two on each sub-point. It may even be just a couple of sentences.

The great thing about using “tips”, “steps” or “secrets” is that you don't need to write lots about every point - just a few sentences on each will do fine. Here are some points to make your content better:

- Write with someone in mind. Imagine you are in a conversation with a friend. Where appropriate, use the words “you” and “I”.
- Inject your personality. Just be yourself and use your own style. Don’t be afraid to share a personal story or mention personal thoughts. Your Lead Magnet is about helping the reader get to know you.
- Keep It Simple: It doesn’t need to be anything fancy. Just state the facts. Get straight to the point and focus on the important facts or information.

Don’t write too much – or talk too much if you are recording it. It’s more important to provide quality content than lots of pages.

For a document such as a report or article, the final step is usually to convert it into a PDF so that your new subscribers can download it to their computer.

The latest versions of Word and Open Office allow you to do this within the program. If you don’t have these, a quick Google search for ‘PDF conversion tools’ will give you a choice.

You can have someone create a layout for you on [fiverr.com](https://www.fiverr.com) for a few dollars if you prefer not to handle this yourself.

The final step is to upload your Lead Magnet to your website so that people can download it from your Thank You page (more on that in a moment).

LEAD MAGNET KEY #4: MAXIMIZE ATTRACTION

Now that you've got your great Lead Magnet, you might think people will be lining up to get it.

Well the truth is, no matter how great it is, you still need to persuade them and make it as easy for them as possible.

You need to actually give your prospects a reason to join your list. You have to make a case for your free Lead Magnet almost as if you were asking someone to pay for it.

There are various ways you can ask someone to give you their details when they reach your website:

- **Signup Form:** This is a box that appears somewhere on your web page where people can enter their name, email address and other information you request.

This is linked to the system you use to collect email addresses such as your autoresponder provider. Most of these offer some flexibility in the design of this so you can include different typefaces and graphics.

- **Squeeze Pages:** These are special web pages where the only purpose is to get people to sign up for your Lead Magnet. It's like a mini-salesletter for your Lead Magnet, probably just with a few bullet points.

- **Popups:** Popups are an additional way of promoting your Lead Magnet and they appear separately on the webpage.

There are various different types of popup – some appear as a new page within the web page, some 'hover' within the page, some slide in from the side and others appear when someone tries to leave your site.

Some types of popup are now blocked by most web browsers but there are many types that still work.

Most people say they hate popups and therefore many hesitate to use them – but they can be very effective.

- **Sales Pages:** You can sometimes improve your results by taking the time to create a full sales letter explaining your Lead Magnet and the benefits of joining your list.

This takes a bit more commitment to create and also takes more time to read.

This approach may mean fewer people actually sign up but you'll often find they are higher quality subscribers as they have bought into the whole message.

I have a sales letter on my site as well as the sign up box.

These are the general principles you need to follow to create a signup form that gets as many people as possible to join your list.

- **Strong Headline:** The job of the headline is to make the reader stop and pay attention and read the rest of the page. If the headline is not strong enough to grab their attention, the Lead Magnet might as well not even exist.

On my site, the headline is “Legally Slash Your Tax Bill by Up to 62%,” which is actually the title of the report but you could have something different.

In addition to the headline, you may choose to have a few bullet points.

- **Call to Action:** Your signup form should have a strong call to action. You must tell your readers exactly what you want them to do.

“Enter your details here!” or “Download Now”

- **Image:** As one of your main tasks at this stage is to attract people’s attention, it can make a big difference to have a strong graphic image of your Lead Magnet. A good image can make your offer seem more valuable, attractive and compelling.

Equally, poor graphics can turn people off. So, if you’re going to have a graphic, make it a good one. You can get a good graphic created for a few dollars on a site like fiverr.com.

- **Thank You Page:** After someone has signed up for your Lead Magnet, you should make sure they are taken to a download page or “Thank You” page on your website that they will recognize. You should include the link to this page in the welcome email that you send out to new subscribers.

WHAT'S NEXT?

It pains me to see so many of my colleagues suffering when you could be making an additional \$50,000, \$100,000 . . . even \$200,000+ a year.

It hurts me to see many of you working 60-90 hours a week, while I run a very successful operation working three days a week.

In this special report, I shared with you my proven leverage points that have helped me and my coaching members to build a successful firm.

If your firm is not where you want it to be and you'd like more help, I'd like to continue this journey with you through one of my programs. Please go to the last page of this special report or visit my website at www.CPAMarketingGenius.com.

To your success!

Salim

WHAT PRACTITIONERS ARE SAYING



We were able to put our heads together and quickly design one system- for the entire office/ administrative staff to use- to remedy the problem.

The results of this were two - fold. Not only did we address an issue that was concerning to us, but we all saw how easy it was to systematize a process. Our goal is to continue to use systematic thinking to approach other areas of concern. Though the use of systems we hope to achieve better staff performance, better client service, and a more profitable CPA practice. Thank you Salim!

James Boehm, CPA

San Antonio, TX



I met Salim about a year ago and since that time my practice has been transformed. Not only does Salim teach you his methods of acquiring new quality clients, but he gives you the actual tools to do just that. Salim has added tremendous value to my practice and my life and I always look forward to learning from him.

Not only that, but Salim is also a quality individual who truly cares about your success. I say that from personal experience.

Pete Marchiano, CPA

Bayville, NJ



I wasn't quite sure if this was for me but I took a leap of faith and it's turned out to be a really great thing.

It's the middle of April and I've brought my family to a beautiful place here in the Georgia mountains. Being here would not have been possible had it not been for all the coaching and counseling I've received not only from Salim, but from the other coaching members as well.

It's been a real difference maker. I've had the best Tax Season I've ever had in 14 years of working on my own and that would not have been possible without the groups help.

Sonu Shukla

Orlando, FL



This change of life has given me some opportunities that I thought I would never have as far as be able to take off for retreats and do some extra thinking and reading. Also, doing goal setting which is something we've never done before. I'm doing weekly strategy meetings which I would have never done before without the clarity and focus from Salim's group.

Dale Hammernik

West Allis, WI



What I've always appreciated about Salim Omar's approach is that he delivers a step-by-step blueprint for CPA firm success so that you don't have to be in Mensa to do very well in following his strategies. Many of our clients have become very successful in following his material.

Nate Hagerty

CEO, TaxProMarketer



In my education, I had been taught how to be a CPA, not a CEO. I love this quote from Salim's book, which is true for a lot of CPAs that are starting their own firm. This book dives into the leadership and best practices on building your ideal business. It will guide you step by step from the idea to the execution of creating a firm that will make you proud. It's truly a great read for those that want to create a fulfilling business that generates revenue and allows for a true work-life balance.

Scott Zarret, CPA

President, CPAacademy.org



In this book, Salim has laid out his blueprint to building a more successful practice. Step by step it takes you from foundation to building the firm that you really deserve. It is much easier to follow in the footsteps of a success then to carve your own path. He has created success for himself and has chosen to help guide the rest of us on that path. I am happy to report that Salim methods have led to a huge increase in my practice and a happier lifestyle. As part of his coaching group, I have already had a six figure increase in revenues this year.

Peter Holtz, CPA

Stockton, CA



I found the conference to be of the highest marks. I'm amazed at the caliber of some of the presenters. I took some of my teammates with me and each of us walked away with about 20 written action items we plan on taking over the next several months.

I believe those action items when implemented will increase our revenue by at least \$200,000. Well worth our time, we already signed up for next year, we are so excited about it!

John Briggs, CPA

Sandy, UT



If you are looking to grow your practice, then you need to listen to what Salim has to say. I have attended every one of his live conferences, been in his coaching program and attend just about every event he puts on to absorb his wisdom.

The success and growth of my firm's gross revenues has doubled over a 3-year period and still continues to grow at 33% each year all due to his wisdom, advice and encouragement. He is also the reason that I have been able to take memory creating vacations with my family to wonderful places like England, France, Italy and Canada over the last 3 years. Not only that, but I have been in the best cash position I have ever been during my almost 7 years of having my own practice. If you are not going to take action after reading this book of knowledge, then I don't suggest you waste your time or money. But I guarantee if you become the king or queen of implementation, you will find this book the best money you have ever spent.

Dan Henn, CPA

Rockledge, FL

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