



Growing beyond traditional accounting services with HR technology

Presented by **accountingWEB**  
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# How Proper Marketing Can Grow Your Client Base

It can't be overstated that marketing is simply not a strong suit of CPAs or accounting professionals in general. That doesn't make it any less necessary, particularly as firms add services and offer client expertise. They need to shout it to the world, but often don't.

This case study focuses on how LWS Tax & Accounting Services, a small firm in rural Ohio, was able to grow its client base, staff and service offerings in under two years through thoughtful marketing and assistance from payroll and HR partner ADP® and their CountingWorks PRO marketing dashboard.

The fact is ADP's recent research shows that 57 percent of clients are not fully utilizing all the services their accountant offers.\* Meanwhile, firms are starting to build up their advisory services and need to get the word out in a better way, either through social media, their own targeted marketing and creative types of content.

## Background

LWS, from Springfield, Ohio currently focuses on tax prep, tax planning, payroll and advisory services including HR. Blake Shaffer, the firm's founder, had worked at other firms and didn't like how they did things. So, he started LWS (named after his son Landon William Shaffer) at the age of 24 and was dedicated to make it work. It was a slow go and until about 18 months ago the firm only had around 100 tax and business clients. Something had to change.

## Quick Facts



**Blake Shaffer**  
Founder

Name	LWS Tax & Accounting
Industry	Accounting
Established	2008
Employees	15
Headquarters	Springfield, OH
Website	lwstax.com



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-Blake Shaffer,  
Founder



## The Problem/Challenge

The firm wanted to grow their client base and staff as it was difficult to sustain a practice with what they had.

## The Process

First and foremost, Shaffer realized he wanted to hire a marketing person to focus on overall marketing efforts; one that had some ideas, knew social media and could ultimately work with his vision.

“I knew people were connected on their devices and knew I wanted to go and make some content for them on that platform,” Shaffer said.

The firm had already grown its staff and services a bit, but payroll and HR services were an area they wanted to focus on. Having used RUN Powered by ADP® Payroll for Partners (RUN Wholesale) as their processing platform since 2015, they had connected with ADP to help with that.

The firm was ultimately introduced to ADP's CountingWorks PRO marketing dashboard, which provides free marketing tools such as marketing brochure PDFs, marketing videos with customizable logos and customizable profiles. Accountants enrolled in either ADP's RUN Wholesale program or Accountant Revenue Share Incentive Program get complimentary access to CountingWorks PRO.

“CountingWorks allowed us to white-label things where we can have videos on payroll services, brochures, good content with our brand to tell our audience we are a leader in this industry,” said Shaffer. “We post really good payroll content, people follow it. It's really high-quality marketing material. Something we may not have built on our own.”

Shaffer said many of the marketing ideas they have “come from my own head” and he works with his marketing manager to execute them. One area that has been successful in showing firm culture and ultimately getting client engagement are humorous and informative videos that are shared on social media.

## The Result

In the past 18 months the firm has increased revenue by nearly 200 percent, grew from 4 to 15 employees, and experienced its first year as a \$1M firm, looking at nearly \$2M in 2020. In addition, the firm went from handling payroll & HR services for around 75 clients to close to 200.

## Lesson/s learned

"When you grow fast you have to learn fast and as such we did lose a few clients," said Shaffer. "When you go through crazy growth, communication can drop and that happened. You do learn a lot from mistakes and we know we need to hire first for the growth we're planning and maintain better client communication throughout."

## Next steps

The firm has a goal of having 1,000 payroll clients in 5 years. The scale and flexibility of ADP's RUN Wholesale platform will allow for LWS to continue to grow without missing a beat. In house, the firm would like to grow technology, processes and training. "We have to streamline our processes and get more serious about training and that we're up on the latest and best technology."

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Founder and CEO



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\*ADP Survey, March 2019.

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