

A Step-by-Step Guide to Marketing Bill.com



Your clients are small business owners with limited time, especially when it comes to back office tasks such as paying bills. As part of your practice's offering, Bill.com simplifies the bill pay process for your client, giving back the time they need to focus on their business.

We've compiled a marketing toolkit that's chock-full of resources and customizable templates designed to make marketing Bill.com and your firm a snap. Read our step-by-step plan to find out how you can use these tools to reach existing clients and win new clients along the way.

Get Existing Clients On Board

1. Determine Your Audience

You know what your clients need. Some will be more responsive to the demand for efficiency than others, and this is the group you should focus on. To find the best candidates for Bill.com, look for those with the following characteristics:

2. Pay more than 10 bills each month
3. Are disorganized today, but have a desire for more efficiency
4. Are frequently missing papers and expense documentation
5. Want better cash flow management
6. Don't have a dedicated employee looking after their billing

PRO TIP

Be sure to customize and personalize—zero in on the benefits you want to emphasize to your audience. For example, reducing the risk of fraud or the time it takes to pay bills.

2. Develop Your Message and Offer

Once you have your audience nailed down, craft a message that will address their pain points or the benefit that will resonate best. Here are a few examples:



Save time

Sample copy: Are you spending too much time paying your bills? We can help with that using Bill.com. Leave the tedious process to us—like entering, categorizing, and paying bills—and we'll leave the approvals to you, which you do on any device.



Run your business more strategically

Sample copy: Do you want to run your business more strategically? Outsource your bill pay to us to gain more financial control and reduce risk—so you can get back to running your business.



Outsource to reduce risk

Sample copy: Data in transit is encrypted using industry-standard Transport Layer Security (TLS).

Next, work with sales to determine an offer that is right for your firm. For example, you might provide a free consultation or a short product demonstration with new and existing clients.

At the end of the conversation with a prospect, your sales lead(s) can discuss pricing structures and reinforce the value Bill.com delivers. (Need help with pricing strategy? Check out the pricing page <<insert hyperlink>> in the Accountant Resource Center.)

3. Get the Word Out

Now you're ready to reach out to your client base with exciting, useful, and actionable content.

The assets in our kit will enable you to create the following marketing materials.



Ad templates

Include one of the three different ads in your marketing newsletter.



Blog posts

Use/adapt one the sample posts on your company's blog. Don't have a blog? With a few edits, a blog post can be modified into a short article for your client newsletter.



Email templates + how-to guide:

Use the email plain text samples and send to your clients; include the co-branded brochure or Bill.com video. Get tips on how to make sending emails a quick and simple task.



Landing page

Work with your web team to upload the landing page template to your website. Later on, enhance the site with a video or customer testimonials.



Webinars

Use the overview deck and videos to demonstrate how Bill.com can put more time into your client's workday, and help them be more efficient when it comes to paying bills.

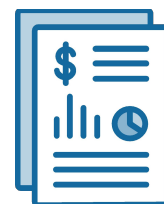


Social Media

Leverage your firm's social media channels to highlight how your clients are benefitting from Bill.com. Provide links to your firm's Bill.com landing page or share quick Bill.com facts and tips.

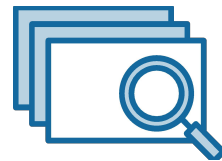
4. Show, Tell, and Close

The last step: Be ready to show interested clients all the great Bill.com features and how they will benefit their business. When selling, harness the power of these tools in our kit:



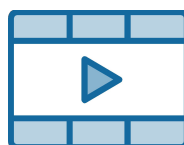
Sales cheat sheet

Start conversations, answer questions, and let the greatest benefits shine through.



Overview Deck

Guide your presentations with a scripted deck that highlights the benefit of your practice, and Bill.com.



Demos

Show clients how it all works by walking them through a demo, or show/share the video demonstration.

Then, sign them up. Once they're on board, use the tools in the "Setting Up Clients" <<hyperlink>> section of the Resource Center to get them underway.

Win New Clients

Growing your business is always on your mind, but you don't always have a lot of time to spend on finding new clients.

Use the Bill.com marketing tools to craft your message, and then take it out into the world.

Here are 4 steps to connecting with the clients you want:

1. **Determine who's your ideal client. Here is the top-level message and some draft messages points to help you craft a story they'll respond to.**

Top-level message: Better manage your cash flow in much less time by outsourcing your bill payments to us. We use Bill.com to help our customers gain financial control and reduce risk, so they can spend more time running their business and make smarter business decisions.



Run your business more strategically

Sample copy: Do you want to run your business more strategically? Outsource your bill pay to us to gain more financial control and reduce risk—so you can get back to running your business.



Save time

Sample copy: Are you spending too much time paying your bills? We can help with that by using Bill.com. Leave the tedious process to us—like entering, categorizing, and paying bills—and we'll leave the approvals to you, which you can do on any device.



Outsource to us to reduce risk

Sample copy: We do the work, and you get the benefits: better cash flow management, more time to run your business, and less hassle & risk.

2. **Further your voice by leveraging the social media channels as well as the landing page template provided in our toolkit.**

3. **Find speaking events/opportunities where you can promote your firm and connect with ideal prospects.**

Before you go:

- Brainstorm topic angles (e.g., automation, efficiency, or security) and then prep your speaking notes for each.
- Determine what your offer is, such as a free evaluation/consultation of their current processes.
- Develop customer success stories.

At the event:

Collect contact info, and follow up with the offer (e.g., a free consultation).

4. **Nurture. Use the email templates to follow up with your new connections by sending a short, personalized email that links to the co-branded brochure or videos.**

Marketing is key to helping your practice grow. Thankfully, you can do that with limited marketing resources. Our kit has what you need to create a plan to market your firm and Bill.com and the tools to make it happen.