# Big Plans Checklist

## For QuickBooks Accountants

As a skilled financial professional, you understand that each customer has unique needs and preferences. Your clients trust your expertise, and it's important to maintain regular communication with them. Email helps you build stronger relationships with your clients and provide them with even more value.

You can increase client retention and referrals by reminding them of upcoming deadlines, sending educational content, and providing assistance throughout the year. All you need is access to your updated client contact list.

**Let's get started!**

## ☐ Step 1: Get clients ready to hear from you

Building a mailing list is an excellent way to promote your firm via email, but you only want to target those clients who want them. Do you have an existing client list with updated contacts? First, you need to **obtain opt-in**, meaning getting permission from your clients to receive tips, reminders, and more from your practice.

An easy way to obtain opt-in is by putting a link at the bottom of your emailed invoice inviting them to join your email list.

**TIP:** *Don't forget to **add a signup form** on your website too, so you can start building your audience past your existing clients.*

## ☐ Step 2: Sync your contact list from QuickBooks

**You can now import your existing client contact list** manually or use our integration tools to sync your contacts. Connecting your QuickBooks Online account to your new Mailchimp account is easy—**follow these instructions**. You can choose what information beyond name and email you'd like to import including paid invoice data, location, business type, etc.

Syncing your QuickBooks client list will import it into Mailchimp and create an "audience," or the contacts that you can now email.

**TIP:** *Mailchimp automatically organizes your QuickBooks clients after you sync your account. You can easily **send a targeted email** to a specific audience (e.g. existing clients with an LLC) by selecting it in your Audience dashboard and sending off a 'reminder to pay your monthly invoices' email.*

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☐ ## Step 3: Start creating your content

Once you've decided on the theme of your first email, browse **Mailchimp's email templates** and choose one that fits your needs. Or use Mailchimp's **Creative Assistant**. It can help you easily get started and generate a design from your firm's website, including colors, fonts, and images.

Now add your content to the email template, including your logo and contact information. Customize your template layout by dragging and dropping content blocks for text, images, files, etc.

For example, you can put together a short "welcome" email with details about how you'll be sharing valuable tips, reminders about important deadlines, and special discounts for referrals moving forward to help set them up for success in the new financial year.

Preview your email to see if it requires any changes and send a test email to yourself or your team to catch any typos or potential changes.

**TIP:** *Combine your QuickBooks paid invoice data with Mailchimp's powerful automation tools to add a personal touch to your emails.* **Learn how in this video***.*

☐ ## Step 4: Send your first email

From your organized QuickBooks clients list, select the contacts you want to reach. Since it's a "welcome" email, you might want to reach everyone or **target those in specific industries** or business sizes—for example, just self-employed clients.

☐ ## Step 5: Review your email analytics report

After each email you send, you can use **Mailchimp's email analytics reports** to help you see what messages resonated most with your audience, so you can keep making your emails better.

**This video shows how to view and understand** your email campaign report in Mailchimp.

☐ ## Step 6: Try Mailchimp's new Customer Relationship Management Beta

Track prospective clients through your client lifecycle (leads, prospects, consultations, clients) using Mailchimp's Pipeline and Inbox tools. To participate in the Beta, please reach out to **Kylie_Tuosto@intuit.com** to get you setup.

**Setup pipelines:** Create a sales pipeline and start tracking work for existing and prospective clients.

**Setup Inbox:** Streamline client communications using your inbox. Contact form inquiries will land in your inbox so that you can quickly and easily respond, track, and manage new client intake. You can also forward your emails to your inbox to manage all of your communications in one place.

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