

Kelli Cox, CGC Accountants & Advisors

Full Service CPA firm



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CGC Accountants & Advisors

CGC Accountants & Advisors brings together experience, knowledge, and technology to provide you with comprehensive solutions. Our commitment to service allows us to go the extra mile to help you identify and achieve your financial objectives.



“ To sum it up, during our first tax season we added 80 new tax returns! That is a big number for a brand-new firm. We are very pleased and looking forward to a bright future! ”

Summary

With over a decade of experience in the tax and accounting industry and working for several local CPA firms, Kelli Cox always knew that she wanted to open up her own firm because of her entrepreneurial spirit and creative ideas on how to do things in a better and efficient manner. Through a wonderful combination of events, Kelli was able to open her own firm last year. She partnered with a well-respected CPA with an established book of business and another talented and entrepreneurial CPA. Together, CGC Accountants & Advisors was formed where their goal is to provide top notch service to their clients, as well as to grow the firm rapidly.

CGC Accountants & Advisors have a full-service type of business. They not only focus on tax and accounting, but also tax planning, succession planning and business advisory. Because CGC Accountants & Advisors was newly established, Kelli wanted to have a strong social media presence for her clients, maintain a quality website and have an effective way to communicate with her clients.

What was the challenge?

Being a new CPA firm, one of Kelli's primary goals was to “start marketing, fast, to grow the business.” An issue she found herself running into was “time pressure.” She as well as her partners were handling the startup and there “just wasn't enough time for the partners to address marketing.” She was looking to work with a company to take that weight off her shoulders as far as “website maintenance/SEO and client communications”.

How did CountingWorks Pro help?

Kelli came across an email detailing CountingWorks Pro services and it sounded as if this was what she was looking for. To her surprise, she “didn't know the answer would come all in one package!” What she found most helpful were our newsletters. “We had been looking for a good solution to keep clients informed, but didn't like any of the other blogs/articles we had



51%
Organic Traffic
Increases



80
New clients



150+
1st Page Ranking
Positions

seen. But the most appealing and effective service from CountingWorks Pro was the client newsletters that they send out.”

Kelli has received great feedback from her clients. In just one year “we are getting great responses from the website and Google searches – much more than we anticipated. It has saved us a great amount of time and effort trying to do this ourselves. I feel that our name is getting out there on the web.” Says Kelli, “additionally, the newsletters have given us a way to stay in touch with our clients while giving them quality information.” Working with CountingWorks Pro has also given her the ability to “utilize the client communications systems in other ways, such as filing reminders that really streamline the process.”

What are the results?

Since working with CountingWorks Pro, Kelli and CGC Accountants & Advisors “have gained 80 new clients during this past tax season alone. The increase in visibility on the web and accompanying calls has been noticeable. Even after tax-season, we are still getting many calls a week.” Says Cox, “I wasn’t prepared for the interest that the website, TaxBuzz and Google searches would provide. We had calls nearly every day during tax-season and while some of the clients were not the right fit, many of them were and I notice that many of our clients passed on the newsletters to their friends.” When asked what she was most impressed with when working with CountingWorks Pro, she said “the quality of support was amazing – if we have a question, it is always addressed and support has been pro-active in recommending action.”

Conclusion

Overall, CountingWorks Pro was able to solve the challenge Kelli’s practice was facing, which was to take the weight of their shoulders in delivering a service that provided website/SEO assistance, online branding and client communications. Says Kelli, “to sum it up, during our fist tax season, we added 80 new tax returns! That is a big number for a brand-new firm. We are pleased and looking forward to a bright future!”

CountingWorks Pro was successful in assisting Kelli and the team at CGC Accountants & Advisors in providing them with an effective way to communicate with clients, build her online reputation, which in turn lead the growth of her practice. Our work together has “exceeded expectations” and a once “skeptical” Kelli is now a “believer.”