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# MARKETING PLAYBOOK

## GreenLight Bookkeeping

Bookkeeping and tax prep built for freelancers

Q1 2026 | Version 1.0

Prepared by Owl Playbook

*Classification: Internal*

# How to Use This Playbook

## What is this?

This is your go-to-market playbook for GreenLight Bookkeeping. Think of it as a step-by-step field guide for finding your first customers and making your first sales.

## How to use it:

1. Skim Your Business at a Glance on the next page for the big picture.
2. Go straight to Your First 30 Days — that's your action checklist. Start there.
3. When an action mentions a customer type, a pitch, or a channel, flip to the matching Reference Section for the full detail.
4. Come back to Questions to Answer whenever you're unsure what to try next.

## A note on “Best Guesses”

You'll see some items marked as best guess 📎. That's completely normal — every new business starts with educated assumptions. The whole point of your first few sales is to replace guesses with real answers from real customers.

## Your Business at a Glance

GreenLight is a one-person bookkeeping and tax prep service built specifically for freelancers and independent consultants — expert-level service at a price that actually fits your budget.

<p><b>Your Customers</b></p> <ul style="list-style-type: none"> <li>• Solo Creative Freelancers — Designers, developers, and copywriters who've outgrown TurboTax.</li> <li>• Independent Consultants — Former corporate pros running their own practice and billing serious money.</li> <li>• Small Service-Based Businesses — Owner-operated agencies and coaching businesses with 1–5 employees.</li> <li>• Coworking Space Members — Community-driven freelancers who trust peer recommendations over ads.</li> </ul>	<p><b>Your Pitch</b></p> <ul style="list-style-type: none"> <li>• "The Perfect Fit for Growing Freelancers"</li> <li>• "The Freelancer's Financial Partner"</li> <li>• "One Partner, Complete Solution"</li> <li>• "Reliable Expertise, Right-Sized for You"</li> </ul>
<p><b>Where to Find Them</b></p> <ul style="list-style-type: none"> <li>• Local freelancer Facebook groups and Slack communities</li> <li>• Alternative coworking spaces (in-person presence)</li> <li>• Structured referral program with existing 18 clients</li> <li>• LinkedIn value-first content + Free Tax Health Check offer</li> </ul>	<p><b>First Moves</b></p> <ul style="list-style-type: none"> <li>• Email all 18 current clients asking for one referral each</li> <li>• Join 3 local freelancer Facebook groups and contribute for 2 weeks before pitching</li> <li>• Visit 2 local coworking spaces and introduce yourself to the community manager</li> <li>• Post one piece of genuinely useful tax content on LinkedIn this week</li> </ul>

<p><b>18</b> Active clients — all from word of mouth</p>	<p><b>10</b> New clients needed this quarter</p>	<p><b>8 years</b> Mid-size firm experience behind the service</p>	<p><b>\$150–\$800</b> Monthly bookkeeping range across segments</p>	<p><b>0</b> Repeatable acquisition channels right now — that's the problem to fix</p>
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## Your First 30 Days

This is your action checklist. Work through it in order — some steps depend on the ones before them. When an item refers to a customer type or a pitch, flip to the matching Reference Section for the full detail.

### Week 1: Activate What You Already Have

Email all 18 current clients asking for one specific referral

BLOCKER

Set up a free Calendly link for a 30-Minute Free Tax Health Check

BLOCKER

Join 3 local freelancer Facebook groups and start answering questions

Post your first piece of useful tax content on LinkedIn this week

### Week 2: Get in the Room

Visit 2–3 local coworking spaces and meet the community manager in person

Find and register for 2 local freelancer or entrepreneur meetups on Meetup.com

List 10 complementary service providers (web designers, coaches, marketers) to contact

Follow up with any current clients who didn't respond to your Week 1 referral email

### Week 3–4: Make Offers and Track What Works

Post your Free Tax Health Check offer in the 3 Facebook groups you joined

Email your list of 10 complementary service providers with a referral partnership proposal

Attend the 2 meetups you registered for and follow up with every contact within 48 hours

Track every lead in a simple spreadsheet: source, date, outcome

Propose a 'Freelance Tax Basics' lunch-and-learn to the most receptive coworking space

## Week 1: Activate What You Already Have

**▲ DO THIS FIRST**  **Email all 18 current clients asking for one specific referral**

*Your warmest leads are people who already trust you. A personal ask from you is worth more than any ad or cold outreach.*

**▲ DO THIS FIRST**  **Set up a free Calendly link for a 30-Minute Free Tax Health Check**

*Every channel you activate this month needs somewhere to send interested prospects. Without a frictionless booking link, you'll lose warm leads.*

**Join 3 local freelancer Facebook groups and start answering questions**

*This channel takes 2 weeks of contributing before you can pitch — starting now means you can make an offer by Week 3.*

**Post your first piece of useful tax content on LinkedIn this week**

*LinkedIn content compounds over time. One post per week starting now builds credibility that pays off in weeks 3–8.*

## Week 2: Get in the Room

**Visit 2–3 local coworking spaces and meet the community manager in person**

*Coworking referrals built your first 18 clients. Reactivating this channel through new spaces is the fastest path to replicating that success.*

**Find and register for 2 local freelancer or entrepreneur meetups on Meetup.com**

*In-person trust builds faster than any online channel. One good conversation at a meetup can turn into a client and a referral.*

**List 10 complementary service providers (web designers, coaches, marketers) to contact**

*Partner referrals are high-trust and cost nothing. Building this list now means you can start outreach in Week 3.*

**Follow up with any current clients who didn't respond to your Week 1 referral email**

*A second personal email — not a mass blast — dramatically increases response rates. Don't leave referrals on the table.*

## Week 3–4: Make Offers and Track What Works

**Post your Free Tax Health Check offer in the 3 Facebook groups you joined**

*You've spent 2 weeks building credibility in these groups. Now it's time to make an offer — the trust you've built makes it land differently than a cold pitch.*

**Email your list of 10 complementary service providers with a referral partnership proposal**

*Partner referrals are one of the highest-converting channels for service businesses. A personal email with a clear mutual benefit gets responses.*

**Attend the 2 meetups you registered for and follow up with every contact within 48 hours**

*The follow-up is where meetup connections become clients. Without it, the conversation dies.*

**Track every lead in a simple spreadsheet: source, date, outcome**

*After 30 days you need to know which channels are actually producing conversations. Without tracking, you're guessing.*

**Propose a 'Freelance Tax Basics' lunch-and-learn to the most receptive coworking space**

*A free educational event positions you as the expert in the room and generates warm leads in a single hour.*

## R E F E R E N C E   S E C T I O N S

The following sections provide the detail behind your action plan. When a step in "Your First 30 Days" mentions a customer type, a pitch, or a channel, flip to the matching section here for the full detail.

## Your Best-Fit Customers

4 types of people are most likely to buy from GreenLight Bookkeeping. The plan is to reach out to all of them in your first 30 days and see who responds fastest.

### Solo Creative Freelancers

Independent designers, developers, copywriters, and other creative professionals who have grown beyond basic tax software but don't need enterprise-level financial services. They value personalized service and someone who actually understands their business. This is GreenLight's core historical client base.

<b>Who they are</b>	Solo freelancers in creative fields (design, development, copywriting); annual revenue \$50K–\$200K; typically 2–7 years into their freelance career.
<b>What they want</b>	Accurate bookkeeping and tax prep that understands freelancer-specific deductions, quarterly estimated payments, and irregular income — without paying CPA firm rates.
<b>Why they care</b>	They've hit the ceiling of TurboTax and DIY spreadsheets but can't justify a large firm. They want someone who already speaks their language so they don't have to explain what a 1099 is.
<b>What they'll spend</b>	\$150–\$400/month for bookkeeping; \$800–\$1,500 for annual tax prep 📎

★ **Recommended starting customer: This is your proven segment — your existing 18 clients skew here, referrals flow most naturally from this group, and the pitch is sharpest. Win 5–6 clients here first, then expand.**


### Independent Consultants

Former corporate professionals who have left to run their own consulting practice. They need reliable financial management so they can focus on client work, not admin. They tend to earn more than solo creatives, which means higher willingness to pay.

<b>Who they are</b>	Former corporate professionals running independent consulting practices; 5–15 years of industry experience; annual revenue \$75K–\$300K.
<b>What they want</b>	Professional bookkeeping and tax services that handle business expenses, client invoicing complexity, and strategic tax planning — without the overhead of a large firm.
<b>Why they care</b>	Their time is worth a lot. Every hour spent on bookkeeping is an hour not billed to a client. They want a trusted specialist who handles it all so they can stay focused.
<b>What they'll spend</b>	\$200–\$800/month for ongoing bookkeeping; \$1,500–\$3,500 for annual tax prep 📎

### Small Service-Based Businesses

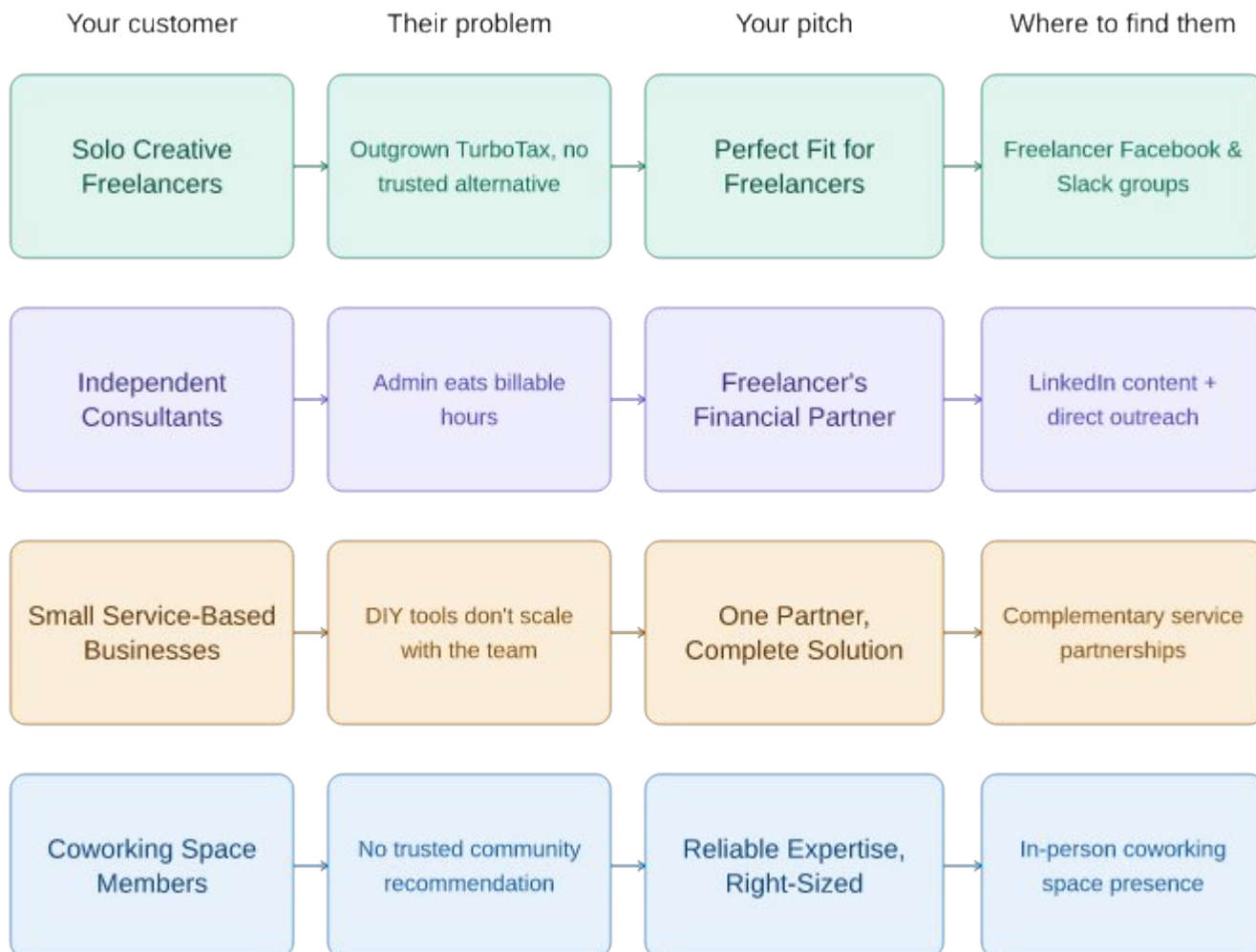
Owner-operated service businesses with 1–5 employees in industries like marketing agencies, coaching, and professional services. They need more than DIY tools but want the personal touch of a dedicated accountant, not a faceless firm.

<b>Small Service-Based Businesses</b>	
<b>Who they are</b>	Small business owners in service industries (marketing agencies, coaching, professional services); 1–5 employees; annual revenue \$100K–\$500K.
<b>What they want</b>	Comprehensive bookkeeping, payroll support, and tax prep that grows with the business while keeping a personal relationship and real industry knowledge.
<b>Why they care</b>	They've outgrown QuickBooks DIY but aren't big enough to justify a full accounting department. They want one trusted person who knows their business inside out.
<b>What they'll spend</b>	\$200–\$800/month for bookkeeping; \$500–\$2,000 for annual tax prep depending on complexity 

<b>Coworking Space Members</b>	
Freelancers and small business owners who work from coworking spaces and trust community-recommended services above all else. This segment is the closest analog to the referral channel that built your first 18 clients. Reactivating it through new coworking spaces is a near-term priority.	
<b>Who they are</b>	Independent professionals and small business owners at coworking spaces; typically tech-savvy millennials and Gen X; annual revenue \$40K–\$250K.
<b>What they want</b>	Bookkeeping and tax services recommended by their professional community, with reliable financial management that understands the coworking and remote work lifestyle.
<b>Why they care</b>	They trust peers over ads. A recommendation from the coworking community manager or a fellow member carries more weight than any Google search result.
<b>What they'll spend</b>	\$150–\$500/month for bookkeeping; \$800–\$2,000 for annual tax prep

## The Big Picture

Here's how everything connects. Each customer type has a core problem, a pitch that speaks to it, and a specific place where you can reach them. Read this left to right:



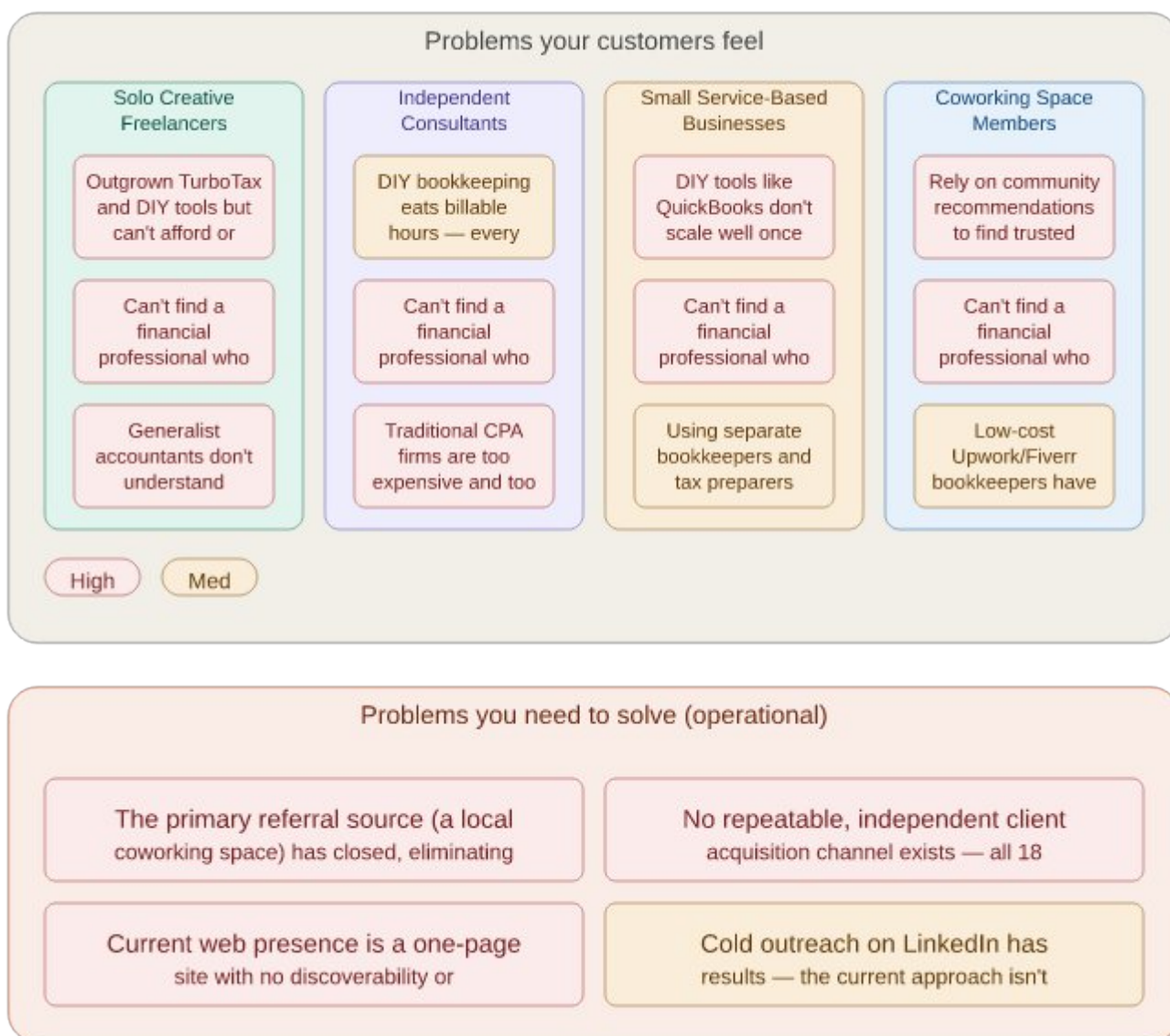
Read each row left to right: customer, problem, message, channel

### → How to read this

Follow each row left to right: that's the customer, their core frustration, the message that speaks to it, and the place where you deliver that message. Each row is a complete mini-strategy.

## Problems Worth Solving

These are the frustrations and gaps your business addresses. They're split into two groups: problems your customers feel (the reasons they'll buy), and problems you need to solve (operational challenges on your side). All are best guesses for now — your first expeditions will confirm which ones matter most.



### Problems Your Customers Feel

#### Solo Creative Freelancers

- **High** Outgrown TurboTax and DIY tools but can't afford or justify a large CPA firm — stuck in the middle with no obvious trusted alternative
- **High** Can't find a financial professional who actually understands freelance business models — discovery is the barrier, not the service quality

- **High** Generalist accountants don't understand irregular income, 1099 structures, or freelancer-specific deductions — clients end up explaining the basics
- **Medium** Using separate providers for bookkeeping and tax prep creates coordination headaches and costs more

### Independent Consultants

- **Medium** DIY bookkeeping eats billable hours — every hour on QuickBooks is an hour not billed to a client
- **High** Can't find a financial professional who actually understands freelance business models — discovery is the barrier, not the service quality
- **High** Traditional CPA firms are too expensive and too generalist for a solo consulting practice
- **Medium** National platforms like Bench assign rotating team members — no consistent relationship or institutional knowledge

### Small Service-Based Businesses

- **High** DIY tools like QuickBooks don't scale well once there are employees and payroll to manage
- **High** Can't find a financial professional who actually understands freelance business models — discovery is the barrier, not the service quality
- **Medium** Using separate bookkeepers and tax preparers creates gaps, errors, and extra cost

### Coworking Space Members

- **High** Rely on community recommendations to find trusted services — without a community referral, they default to DIY tools
- **High** Can't find a financial professional who actually understands freelance business models — discovery is the barrier, not the service quality
- **Medium** Low-cost Upwork/Fiverr bookkeepers have inconsistent quality and no tax expertise

### Problems You Need to Solve

- **High** The primary referral source (a local coworking space) has closed, eliminating the pipeline overnight with no backup channel in place
- **High** No repeatable, independent client acquisition channel exists — all 18 clients came through word of mouth
- **High** Current web presence is a one-page Carrd site with no discoverability or credibility signal for prospects who don't already know GreenLight exists
- **Medium** Cold outreach on LinkedIn has produced no results — the current approach isn't working and needs to change
- **Medium** No structured referral incentive program — existing happy clients aren't being systematically asked to refer

## Your Pitch

These are the messages you'll use when talking to potential customers, writing emails, or posting on social media. Each one is tailored to a specific customer type. Use the "Use this when" note to know which pitch fits which situation.

### "The Perfect Fit for Growing Freelancers"

**Best for: Solo Creative Freelancers**

You've outgrown TurboTax but you don't need a big CPA firm — GreenLight is built exactly for that gap. You get eight years of professional expertise, freelancer-specific knowledge, and a single accountant who knows your business. All at a price that actually makes sense for a solo creative.

**Use this when:** Introducing yourself in freelancer communities, at meetups, or in any first conversation with a creative professional who's frustrated with DIY tools.

### "The Freelancer's Financial Partner"

**Best for: Independent Consultants**

You left corporate to run your own practice — you shouldn't have to spend your billable hours on bookkeeping. GreenLight handles your books, your taxes, and the complexity of consulting income so you can stay focused on client work. One accountant, one relationship, no explaining your business from scratch every year.

**Use this when:** Speaking with former corporate professionals or consultants who are time-poor and billing at a high rate. Lead with the time savings angle.

### "One Partner, Complete Solution"

**Best for: Small Service-Based Businesses**

Managing separate bookkeepers and tax preparers costs you time, money, and accuracy. GreenLight handles both under one roof — bookkeeping, payroll support, and tax prep — with a single accountant who knows your business and grows with it. No handoffs, no gaps, no surprises at tax time.

**Use this when:** Talking to small business owners who are juggling multiple financial service providers or who have hit the ceiling of DIY accounting software.

### "Reliable Expertise, Right-Sized for You"

**Best for: Coworking Space Members**

GreenLight is the bookkeeper your coworking community has been looking for — a specialist who understands freelance income, remote work expenses, and the financial reality of independent professionals. Trusted by 18 local clients who found us through word of mouth and stayed. Ask anyone who's worked with us.

**Use this when:** Introducing yourself at coworking spaces, in community Slack channels, or when a community manager is making a recommendation. Lead with the social proof angle.

**All pitches are best guesses** 🐾 These messages are based on what we know about each customer type. As you talk to real prospects, pay attention to which phrases get a reaction

and which fall flat. Update your pitch language based on what you learn.

# Where to Find Customers

Specific places and actions for reaching each customer type, organized by urgency.

## Start Now

### Local Freelancer Facebook Groups

Best for: Solo Creative Freelancers | Cost: Free

Freelancers congregate in local Facebook groups and trust peer recommendations — showing up consistently with useful advice builds the credibility that converts to clients.

- Search Facebook for '[your city] freelancers', '[your city] designers', '[your city] creatives' and join the 3 most active groups
- Spend the first 2 weeks answering tax and bookkeeping questions with genuinely useful answers — no pitching yet
- After 2 weeks of contributing, post a Free Tax Health Check offer (30-minute call, no strings attached) and pin your credentials in your profile
- Reply to every comment on your posts within 24 hours to keep the algorithm showing your content to more members

### Existing Client Referral Program

Best for: Solo Creative Freelancers | Cost: Free

Your 18 current clients already love the service — they just haven't been systematically asked to refer. A small incentive turns passive fans into active advocates.

- Email all 18 clients this week with a personal note asking for one referral — be specific: 'Do you know any other freelancers who might be in the same boat you were?'
- Offer a concrete incentive: one month of bookkeeping free or a \$100 credit for every referral who becomes a paying client
- Follow up with any client who doesn't respond within 7 days — a second personal email, not a mass blast
- Add a referral ask to your standard client onboarding and quarterly check-in emails going forward

### Alternative Coworking Space Partnerships

Best for: Coworking Space Members | Cost: Low

Your best historical clients came from a coworking space — the channel works, you just need a new venue. Community managers actively recommend trusted service providers to their members.

- Identify 3–5 coworking spaces in your area using Google Maps and Coworker.com — prioritize spaces that cater to creatives and freelancers
- Visit each space in person, introduce yourself to the community manager, and offer to host a free 'Freelance Tax Basics' lunch-and-learn for members
- Leave printed one-pagers with your Free Tax Health Check offer at the front desk or member bulletin board

- Propose a formal referral arrangement: the space mentions you in their member newsletter in exchange for a small discount for their members

## LinkedIn Value-First Content

Best for: Independent Consultants | Cost: Free

Independent consultants live on LinkedIn — posting genuinely useful tax and bookkeeping content for freelancers builds credibility with exactly the people who can afford your higher-tier services.

- Post one piece of useful, specific content per week — examples: '3 deductions most freelance consultants miss', 'How to handle quarterly estimated taxes when your income is irregular'
- Connect with 10 local independent consultants per week using a personal note referencing something specific about their work — not a sales pitch
- Pin a post to your profile offering a Free Tax Health Check with a Calendly link so interested prospects can book without friction
- Engage with comments on every post within 2 hours of posting — LinkedIn rewards early engagement with wider reach

## Free Tax Health Check Offer (Lead Magnet)

Best for: All customer types | Cost: Free

A free, no-strings 30-minute call lowers the barrier to trying GreenLight and gives you a chance to demonstrate expertise before asking for a commitment.

- Set up a free Calendly link for a '30-Minute Free Tax Health Check' and add it to your LinkedIn profile, Facebook group bio, and any printed materials
- Prepare 5 standard questions to ask on every call that uncover pain points and naturally lead to your paid services
- After each call, send a short follow-up email summarizing 2–3 specific things you noticed and how GreenLight would address them
- Track every call in a simple spreadsheet: date, name, segment, outcome — this data will tell you which channels are actually converting

## Start Soon

## Complementary Service Provider Partnerships

Best for: Small Service-Based Businesses | Cost: Free

Web designers, business coaches, and marketing consultants already serve your target clients and regularly get asked 'do you know a good bookkeeper?' — a referral from them carries instant trust.

- List 10 local web designers, business coaches, and marketing consultants who serve small service businesses — find them on LinkedIn, local business directories, and Chamber of Commerce listings
- Reach out to each with a personal email proposing a mutual referral arrangement — you send them clients who need their services, they send you clients who need bookkeeping

- Offer a \$100 referral fee or a free bookkeeping consultation for their own business as an incentive to refer
- Meet for coffee with the 3 most promising partners to build a real relationship — referrals flow from trust, not agreements on paper

## Local Freelancer and Industry Meetups

Best for: Solo Creative Freelancers | Cost: Free

In-person meetups let you build trust faster than any online channel — a 5-minute conversation at a local event is worth 20 LinkedIn messages.

- Search Meetup.com and Eventbrite for '[your city] freelancers', '[your city] designers', '[your city] entrepreneurs' and attend 2 events in the next 30 days
- Prepare a 30-second introduction that leads with the problem you solve, not your job title: 'I help freelancers who've outgrown TurboTax get their books and taxes handled by someone who actually understands their business'
- Bring 20 business cards with your Free Tax Health Check offer printed on the back
- Follow up with every person you meet within 48 hours via LinkedIn with a personal note referencing your conversation

## How You Stand Out

### Similar (But Different) Businesses

These aren't direct competitors, but they compete for the same customer budget and attention. They're also potential partners.

They do this	What they offer	What you offer differently
National Online Bookkeeping Platforms	Established brand, dedicated bookkeeper, monthly reports, software integrations — but limited tax prep and no freelancer specialization	One accountant who knows your business, deep freelancer expertise, and combined bookkeeping + tax prep under one roof at a comparable price
Startup-Focused Platforms	Tech-forward, comprehensive financial services for funded startups — but targets venture-backed companies, not solo freelancers	Built for freelancers earning \$50K–\$300K, not startups raising millions — accessible, personal, and right-priced for independent professionals
Local CPA Firms	Local presence, comprehensive tax expertise, face-to-face meetings — but often expensive, generalist, and hard to reach during tax season	Same expertise level (8 years at a mid-size firm) at a price freelancers can actually afford, with a specialist who already understands creative business models
Freelance Bookkeepers on Gig Platforms	Low cost and flexibility — but wildly inconsistent quality, no tax expertise, no continuity, and no local presence	Consistent, professional service from the same person every time, with full tax prep capability and 8 years of verifiable experience
DIY Software Tools	Very low cost and full control — but the client does all the work, gets no professional guidance, and is on their own for complex freelancer situations	A real human who handles everything, catches what software misses, and gives personalized advice — not just a data entry interface

### What Makes You Hard to Copy

- Freelancer-first specialization: deep knowledge of irregular income, 1099 structures, quarterly estimated taxes, and creative/consulting deductions that generalist competitors can't match
- One accountant, one relationship: clients work with the same experienced person every time — not a rotating team, not a chatbot, not a software interface
- Combined bookkeeping + tax prep under one roof: no fragmentation, no coordination between separate providers, no gaps at tax time
- Eight years of mid-size firm expertise at an independent practice price point: enterprise-level knowledge without enterprise-level fees
- Proven trust signal: 18 clients who found the service through word of mouth and stayed — in a market that values peer recommendations above everything else
- Local presence and personal accessibility: unlike national platforms, you can meet face-to-face and are reachable when something urgent comes up

## Your Biggest Risk

Your biggest competitors — Bench, QuickBooks Live, and FreshBooks — have large marketing budgets and dominate search results. Prospects who Google 'bookkeeper for freelancers' will find them first and may never discover GreenLight exists. Your current one-page website provides no discoverability at all, which means you are entirely dependent on community channels and referrals to get found.

## Questions to Answer

These are the most important things you don't know yet. Each one has a practical way to find the answer. Treat this as your learning roadmap.

### **Which of the 4 segments converts fastest and at the lowest cost to acquire?**

**How to find out:** Track every lead by source and segment in a spreadsheet for 30 days. After your first 5 Free Tax Health Check calls, note which segment showed up most and converted most easily.

● **CRITICAL**

### **Does the Free Tax Health Check offer actually generate qualified leads, or does it attract people who just want free advice?**

**How to find out:** Run 10 Free Tax Health Check calls and track how many convert to paid clients. If fewer than 3 out of 10 convert, adjust the offer framing or the follow-up approach.

● **CRITICAL**

### **Will existing clients actively refer when given a structured incentive?**

**How to find out:** Send the referral email to all 18 clients in Week 1 and track responses over 30 days. If fewer than 5 respond positively, the incentive or the ask needs to change.

● **CRITICAL**

### **Are local coworking spaces willing to formally recommend GreenLight to their members?**

**How to find out:** Visit 3–5 coworking spaces in person and ask the community manager directly. Offer to host a free lunch-and-learn as the entry point. Track how many say yes.

● **HIGH**

### **What do prospects actually say when they explain why they haven't hired a bookkeeper yet?**

**How to find out:** Ask this exact question on every Free Tax Health Check call: 'What's stopped you from hiring a bookkeeper before now?' Write down the answers verbatim. Patterns will emerge after 5–7 calls.

● **HIGH**

### **Is LinkedIn content actually reaching independent consultants, or is it disappearing into the void?**

**How to find out:** Post one piece of content per week for 4 weeks and track views, comments, and profile visits after each post using LinkedIn's built-in analytics. If posts get fewer than 200 views after 4 weeks, change the topic or format.

● **HIGH**

### **Do complementary service providers (web designers, coaches, marketers) actually**

**refer clients, or do they just agree to in theory?**

**How to find out:** Contact 10 potential partners in Week 3 and track how many respond, how many agree to refer, and how many actually send a referral within 60 days. A partner who hasn't referred in 60 days probably won't.

• **HIGH**

**What would it take to make the website a real lead-generation tool instead of a digital business card?**

**How to find out:** Research what the top 3 search results for 'bookkeeper for freelancers [your city]' look like. Note what they have that your Carrd site doesn't — testimonials, blog content, clear pricing, a booking link. Decide if upgrading the site is worth the time investment in Q1 or Q2.

• **MEDIUM**

## What's Still Open

These are decisions you'll need to make as you learn from your first customers. None of them need to be decided today — but keep them on your radar.

### Should you upgrade your website from a one-page Carrd site to something with real SEO and credibility signals?

- Keep Carrd for now and focus all energy on community channels — pro: saves time; con: leaves long-term discoverability on the table
- Build a simple WordPress or Squarespace site with a blog, testimonials, and a booking link — pro: builds organic traffic over time; con: takes 10–20 hours to set up properly
- Hire a freelancer to build the site — pro: faster and better result; con: costs \$500–\$2,000 and requires you to brief them well

*Recommendation: Keep Carrd for the first 30 days and focus on community channels. Revisit this once you have 3–4 new clients and some breathing room. A better website matters most when people are already searching for you.*

*When to decide: After you've landed 5 new clients from community channels and have testimonials worth putting on a site*

### Should you offer a formal referral incentive to existing clients, and if so, what should it be?

- One free month of bookkeeping for every referral who becomes a paying client — pro: high perceived value; con: costs you real revenue
- \$100 cash or account credit per successful referral — pro: simple and clear; con: may feel transactional to some clients
- No formal incentive — just ask personally and rely on goodwill — pro: no cost; con: lower conversion rate without a tangible reason to act

*Recommendation: Start with a one free month offer — it's high perceived value and only costs you if the referral actually converts, which means it pays for itself.*

*When to decide: Before you send the Week 1 referral email — you need to decide this first*

### Which segment should you actively pursue after Solo Creative Freelancers — Independent Consultants or Coworking Space Members?

- Independent Consultants — pro: higher revenue per client (\$200–\$800/month); con: harder to reach and slower to convert
- Coworking Space Members — pro: mirrors your proven referral model and converts quickly; con: lower average revenue per client
- Pursue both in parallel — pro: more shots on goal; con: splits your limited time and attention

*Recommendation: Pursue Coworking Space Members next — the channel mirrors what already worked for you and the trust dynamic is the same. Layer in Independent Consultants via LinkedIn content in parallel, but don't make them your primary focus until you've replaced the coworking pipeline.*

*When to decide: After your first 3 new clients — you'll have a clearer sense of where your time is best spent*

### **Should you run paid ads (Facebook or Google) to accelerate client acquisition?**

- No paid ads yet — focus on free community channels first — pro: preserves budget; con: slower growth
- Run a small Facebook ad campaign (\$200–\$500/month) targeting local freelancers — pro: faster reach; con: requires ad copywriting skill and budget you may not have
- Run Google Ads targeting 'bookkeeper for freelancers [your city]' — pro: captures high-intent searchers; con: competitive keywords and requires a better website to convert traffic

*Recommendation: No paid ads in Q1. Your community channels are free and high-trust. Paid ads require a better website and more budget than makes sense right now. Revisit in Q2 if community channels plateau.*

*When to decide: After 60 days of community channel activity — if you're not hitting 5 new clients by then, paid ads become worth considering*