

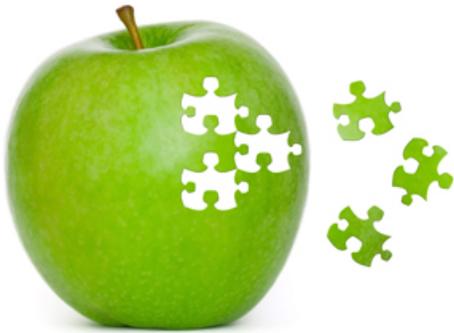
Social & Digital Marketing Tips for CPAs

CRM • Twitter • LinkedIn • Pinterest • Video

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**Technorati Blog Search Results:
147 Accountants
versus
334 Architects.¹**

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Introduction

This ebook has been written to give you a fundamental understanding of how to use social media and digital marketing in your firm.

We'll start off by talking about customer relationship management techniques, then work our way through some social media and digital marketing tips, and end with "Rounds" a Facebook app that could help improve virtual teaming.

Social Media and Digital Marketing

What does social media have to do with my accounting firm?

Over the past five years, there has been a significant change in how firms are marketing themselves to their clients. The shift has gone from a heavily-based email marketing program to a more flexible, social media effort.

According to the May 2012 [Online Accounting and Professional Services Firms Marketing Report](#), by Hinge Marketing, firms are reinventing their marketing strategies, and gone are the days of print and email. Firms are embracing online marketing techniques not only to network, but also as a viable means for generating income. Further, Hinge found that geography was less of a challenge than in the past, and that clients are looking for the best solutions regardless of geographic location.

That said, seeking and implementing a solid online strategy, from search engine optimization (SEO) and marketing (SEM), to having a social media presence is key.

Further, when seeking new talent, do you focus your efforts using an online media? Recruiting talent to help serve a younger client base

requires an online presence. Ensuring you are leveraging both social and digital marketing efforts is imperative; since many studies show social media and online engagement are huge success factors when reaching the twenty- and thirty-something age group of today.

Lastly the Hinge study results indicated that seventy percent of financial services providers plan to increase their online marketing efforts by twenty-three percent in 2013. That is based on the responses of over 57 firms with an average of 420 employees and revenue of \$41 million.

One thing to keep in mind is that social media and digital marketing are not a one-shot deal where you create a post and forget about it. It's about nurturing relationships, building trust, and engaging in the conversation.



Why are small businesses using social media?

- It's inexpensive.
- It's easy to use.
- Their customers are using it.
- It doesn't take a lot of time. ²



You Know More Than You Think About Your Clients—4 Ways to Strengthen Your Email Marketing

This is a great time to schedule a touch-base with your clients. But, oh, what to touch base about? Here are four customer relationship management tips for CPAs to consider as you close out the year.

1. **Personalize:** You have a database of customer information. Use it. Personalize your email or CRM campaign with a tidbit about each client that shows them they are more than just part of your ROI. For example, if you know your client is a dog lover, send them something related to their canine companion, possibly a donation to their favorite shelter or a coupon to a store or gift card for their trusted friend.

2. **Demonstrate Value:** You are interested in your clients, their industry, and how you can serve them. I can assure you, they are just as interested in you, your firm, and your success. Be sure to tell them about the value-add you and your staff have provided in this economically challenging time. Share with them an inside look at some highlights for your firm's future expansion, for example, a mobile app that offers them increased productivity.
3. **Build Relationships.** You may have heard it's ten times harder to gain the loyalty of a new client versus one who's been working with you for years. But, that doesn't mean you should relax your efforts to learn more about each. Reinforce your efforts on how to best communicate with them. And, be sure to ask what services they'd like to see offered in the future. The responses could provide you with a new service offering.
4. **Gentle Reminders:** If you're a tax accountant, remind your clients about how to prepare for the upcoming tax filings and deadlines. Help them to get organized with a Top 5 Checklist. If you're not a tax accountant, still consider ways in which you can help clients to "clear the clutter" with some year-end organizational tips and some "start fresh" ideas.

When considering your CRM efforts, it is best to have a strategy to ensure you are touching base with clients throughout the year.

- First and foremost, consider your firm's personality and the services you provide to clients.
- Many firms leverage an automated CRM solution to aid in the execution of their plan. However, sophisticated software is not always needed when making connections with your clients.

Begin by developing a strategy and then determining if a software solution is best for your firm.

- Schedule time with a CRM professional to help strategize and develop your CRM plan and execution model. If you are just starting out, also consider asking your peers about their best practices.

In the end, your clients will thank you for thinking of them throughout the year, and especially when providing them with tips and tools to make their business lives easier.



Three Tweets a Day to Real Results

Twitter is not a new medium, though many people feel like it is. In fact, Twitter was announced at South-by-Southwest in 2006, and quickly went mainstream shortly thereafter. Since then, it has over [200 million accounts](#) in existence as of September 2011.

As you consider social media in your firm, take a look at [Twitter](#).

There are thousands of CPAs on Twitter, as well as the majority of state societies, national membership associations, major media, and news channels. Think of it as a one-stop-shop for all your accounting- and finance-related news.

Do you need a plan?

Many clients I work with want to join Twitter to have a presence. I often ask them if they have a plan on how to use it, their strategy, the measurement goals, etc. Rarely any of them can easily answer these questions.

After helping them to define their strategy and measurement goals, I often suggest three simple things they can do each day to help increase their connection and following on Twitter.

1. **Share a helpful article about what you specialize in.** For example, if your area of specialty is the employee benefits area, post an article about that topic.
2. **Tweet something about yourself.** What I mean by personal is something that makes you come across as human. For example, “Today I’m attending a conference on [insert topic].”
3. **Answer a common question you hear from clients.** This helps to frame you as a thought-leader and may encourage a potential client to seek you out.

Each of these tasks can be automated. However, be careful with this technique to ensure your brand does not come across as impersonal, “spam-like,” or possibly “ghost written.”

Twitter Strategy

Twitter is a **micro-blogging tool** for people who seek bottom-line results. If you cannot say what you mean in 140 characters or less, work toward that goal.

Also, know whom you’re trying to talk with or whom you want to attract before jumping into Twitter. This allows you to make genuine connections that help you to expand your online brand, while enriching your own knowledge.

[Mashable](#) offered a list of the top [Twitter Best Practices](#) earlier this year. It’s a great starting point for anyone who wants to break into this space.

Lastly, you need a **content strategy** to be really successful with Twitter. This can be accomplished by working with people who specialize in social media, or by speaking with your marketing team to ensure your messages are on brand and represent you or your firm in the best possible light.



How big is Twitter?

In early 2012, there were over 465 million accounts. 175 million Tweets per day. 11 Twitter accounts created each second. 1 million accounts added each day.³

Five Steps to Turn LinkedIn Into a Lead-Generating Machine

So you listed your company on LinkedIn, but maybe you have forgotten all about it—until now. Here are a few tidbits on ways to leverage your LinkedIn company page to your benefit, including generating leads.

In fact, according to [HubSpot's](#) Rebecca Corlis (@repcor), nearly 20% of visitors to the HubSpot LinkedIn company page become a lead. And, those that do connect are business focused, which makes their connection powerful. **

1. **Create and optimize your page.** Enter information about your company, including web site URL, address, specialties, and RSS or news link.
2. **Enable the page for updates.** When utilizing the Admin tools, “enable” updates so you can post status updates to the company page. Be sure to add your name to the “designated users” section of this page so you are authorized to make updates too.
3. **Post a status update.** Much like you would with Twitter or Facebook, add a status update to the company profile a couple times per week. This step can be automated with your other social media efforts, so you only have to post an update one time and have it distributed to all of your social outlets. You can post things like blog articles you’ve written, articles you’re reading, job postings, intriguing questions, and interesting facts.
4. **Invite people to connect.** LinkedIn is all about connections, right? Once your company page is updated, status updates are posted, and administrators have been identified, invite your connections to follow your page. Include a link to the company’s LinkedIn page in your email signature, slide deck contact information, proposals, web sites, and more. Tell the world!
 - a. A great way to create a strong following is if your company is known to support a cause. Post a status update about a donation to that cause and how each follower equals a dollar, which will be donated to the cause. For example, “For every follower we get in the next 15 days, we will send \$1 to the [enter the cause name].”

Then be sure to post an update about the # of people who are now following you—no matter how many that is. And, make the donation!

5. **Monitor results and optimize from there.** As with any type of goal, you must measure it to determine your success. The same goes for LinkedIn. If your goal is to reach 1,000 followers within 12 months, create the plan, take action, monitor the plan, and optimize from there.

So what are you waiting for? Leverage LinkedIn today to showcase your products, to engage customers, and to share your human resource efforts (e.g., job postings).

After all, online, valuable content is your bread and butter. The engagement you get will increase your search engine optimization (SEO). And we all know *that* is good for business.

** Stated during the January 18, 2012 Kick Start Your LinkedIn Company Page Webinar.



81% of LinkedIn users belong to at least 1 group.

Of those people, 52% participate in group discussions. ⁴

Pinterest⁵

Male to Female Ratio

31.8% : 68.2%

Age Demographic

18-25: 6% 26-34: 28%
35-44: 28% 45-54: 25%

What Accountants Need to Know About Pinterest

This year there has been a lot of online buzz about Pinterest, the social media platform where you post images and things of interest that others can view and “re-pin” if they like.

You may be thinking, “Great! Another social media platform to maintain.”

Though Pinterest lists home decorating, wedding planning, and recipes among the reasons to join, there are many other reasons a company, organization, or CPA firm may want to get invited to this platform—**exposure**. With over [11 million unique visitors](#) in the U.S. alone, it’s ranking up there with [Facebook](#) and [Tumblr](#) for engagement.

Its simplistic, organized design is easy on the eyes, but usage isn’t for everyone. Here’s a list of reasons why you should consider using it for your company.

- **Promotion:** Promote your blog, services, or products on this platform. To do so, you need to have some type of image to share. Remember, it is not just about posting products and services; it’s also about engagement. Share insider tips or top trends to aid with engagement and to increase “re-pinning.”
- **Recruitment:** I searched Pinterest using the term “CPA” just to see what I’d get. There were several dozen posts from female students sitting for the CPA exam noting how they planned to reward themselves with coveted gifts when they passed. Firms looking to increase their associate pool may want to consider looking here for potential candidates as well.

- **Content:** Even though women are the dominant demographic, that doesn’t mean you should shy away from this. According to recent research released by [RJMetrics](#), 80% of “pins” are re-pins of other content. If you have something to share with a female audience, this medium could be right for you.
 - For the CPA, target your blog, tips, comments, and services on women-specific issues. Share articles and tips about elder care and the tax implications, trust funds for your pets, saving for your or your child’s future, investing, and so much more.
- **Lead Generation:** In the U.S. this medium is female dominated. However, in the U.K. there is a new storm brewing. The largest growing demographics are [males in the finance](#), marketing, and business areas, as well as people who earn a six-figure income. Additionally, new research claims a male-focused audience is starting to take hold, with topics focusing on architecture, cars, travel, movies, and more. Check out this [infographic](#) for more on how the U.S. and U.K. compare.
- **Vendor & Client Referral:** This may be your new “go-to” place to learn more about a vendor or client you’re planning to work with. View their areas of expertise, interests, and how they present their content to viewers. Knowing these little things about the people you plan to engage with can make the initial engagement more effective.

Take Aways

Pinterest is still in its infancy. Other developers are starting to mimic the platform. That means even though Pinterest is garnering a great deal of interest right now, others will soon follow that are more sophisticated, more universal, and more mobile friendly.

The pace with which social media is moving only increases the need to stay on top of things and to determine how it impacts your social media and marketing strategy. It will be interesting to see what comes from this technology and the pin-board concept.

Ask Yourself

Is your firm right for Pinterest? Is Pinterest right for your firm?



Five Ways to Add Pinterest to Your Marketing Mix

With Pinterest gaining so much momentum, it's important to be prepared for the potential marketing opportunities in this space. Like other social media platforms, this one allows other people to “re-pin” and “like” your content, as well as comment on your pins.

Here are five ways you can leverage the power of Pinterest—with over 11 million users—to help you with your marketing mix, including lead generation, sales, and branding:

1. **Create a Presence.** Begin by creating a user-generated pinboard account. Then create sub-boards to organize your content—this is a lot like a YouTube channel's organization. Begin posting content. Lastly, add Pinterest to your “Share This” list on your blog, website, mobile app, and digital marketing resources (e.g., email signature, emails, newsletters, etc.).
2. **Showcase Your Brand Lifestyle.** I work with several CPA firms. You may have heard the stereotype that CPAs are rigid, conservative, and lack innovation. However, I know several people in firms that contradict the stereotype. [Blumer & Associates, CPA](#) and [WithumSmith+Brown](#) firms are two great examples of CPA firms leveraging a creative approach to accounting. Similar to these two firms' brand lifestyle,

promote the “lifestyle” of your firm on Pinterest to help create interest and to share how you “view the world.” It's the basic branding exercise of “Who/What is your brand?”

3. **Become a Curation Expert.** We all want to be known as experts in our field, but even experts know they do not know everything. Be willing to share content from others—curation—to enhance your site.

Hard product sales and self-promotion are no-no's on Pinterest. Be sure to demonstrate your willingness to work with and share with others. It's the foundation of social media after all. Also by sharing content, [backlinks](#) to other sites often lead to reciprocal backlinks to your site—thus, generating more online traffic and increasing search engine optimization (SEO).

4. **Increase SEO.** Pinterest leverages the use of [hashtags](#), much like [Twitter](#) and several other social media platforms of today. The use of hashtags within content and in cross promotion aids in search engine optimization (SEO), the “free” search mechanism for your online content. Backlinks are another way to increase SEO. So, the more often someone “pins” your content, mentions it in their blog post or on their social platforms, or comments on your posts, the more “traffic” search engines will begin to grab related to your brand.
5. **Feature Events to Generate Buzz.** Similar to [YouTube](#), sharing content from current events may help increase traffic for the next event. Leverage this tool to help create buzz about your future events by posting photos, quotes/testimonials, and snippets from past events. People are curious and want to know why they should attend your event when they have invites to several others. Show them. Remember a picture is worth a thousand words.

You may be thinking, “Great, another social media tool to monitor.”

And, yes it can be overwhelming. But if you sign into Pinterest with your Twitter account email address, you can easily share your new pins through that Twitter account. Currently, Pinterest does not allow a connection to Facebook business pages, but I'm sure it will come.



Is “Rounds” the Next Big Thing in Video Chat?

On May 15, Rounds announced an upgrade to the algorithm for its two-year-old app called [Rounds](#), which allows people and friends of people to hang out and chat via video. It seems very similar to [Google+ Hangouts](#) or some of the other video chat platforms out there. The big deal is that it's on Facebook, the largest social media platform ever, and has more functionality than its competition.

Rounds launched in 2010, and as of this writing had 626,337 Facebook “Likes”. The newest feature is the social matching algorithm, which, according to Rounds, “allows Rounds’ five million users to connect with their friends of friends and hang out with people they are most likely to find interesting.”

Another feature that makes this a little different than the more common platforms like Google Hangouts and [Skype](#) is that you can play games and share content dynamically. Okay, you could share content on the other tools, but playing games with each other live with video ... well now that's just smart thinking on their part.

How Can Rounds Work For You

If your firm has a Facebook page with any number of followers, this could easily replace conference video chats, webinar platforms, gaming applications – for learning and development, content, development projects, and more.

What are the business uses?

- **Chatting with new clients or prospects:** Leveraging tools like Rounds gives partners and business development leaders a chance to “meet” with new clients online before using costly travel to visit in person. Though you could accomplish this with other tools, such as Hangouts or Skype, neither will help drive traffic to your Facebook page.
- **Creating Apps / Fan-Gate content specifically with and for groups:** Rounds also gives you a chance to match like-minded professionals with you, and then allows you share “[fan-gate](#)” content with them via your Facebook page.
- **Learning and Development:** Rounds allows you to think about new learning and development applications to help staff learn together, while competing for the prize – the new client or engagement. Imagine the new, fun way of learning that is right for your team’s goals?
- **Interviewing:** Imagine conducting a first- or second-round interview with a candidate using this platform? Sure, you may already be doing this with other tools, but just think if you have some type of “entrance exam” or screening “APP” to help identify the right candidates with the skills you need in your firm. Doing this before flying them in for the final interview could help determine the final candidate pool. Priceless!

Tell Me More

Here are some stats according to the Rounds team.

- Uses platform data from more than 250 million sessions to align you with others with similar demographics, location, likes, history, and social graph.
- Launched in 2010, and has over 600,000 “Likes”.
- It is the only “communitainment” platform in the world, combining social apps and video chat into one platform.

How do I get it?

The Rounds Video Chat Facebook Application can be added at <http://apps.facebook.com/chatrounds>.

For more information, visit <http://www.rounds.com>.



Videos are 10 times more likely to be shared than links. ⁶

Conclusion

Don't miss out. Firms are growing at a tremendous rate, and doing business and finding leads in ways unlike the past. Harness the energy, the power, and the tools to help your firm succeed in this rapidly-changing environment. Embrace the power of social media, social networking, online tools, and digital marketing strategies to help your firm grow.

To dismiss this evolution could mean the loss of future growth. Are you willing to take that risk?

About the Author



Becky Livingston is the President of [Penheel Marketing](#). Her company specializes in social and digital marketing for small businesses, non-profits, and CPA firms with a particular interest in building/expanding an online brand, increasing web site traffic, and developing a strategic marketing plan that leverages digital marketing.

With 20 years' marketing and communication experience in the engineering, technology, and financial services industries, Becky has been a leader in helping teams to reach their goals through effective and strategic communication and marketing execution.

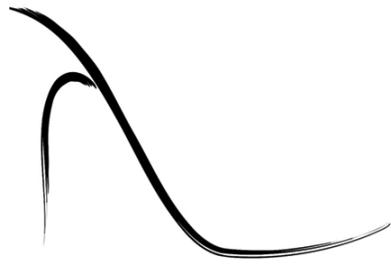
Speaker, author, and trainer, Becky enjoys helping teams to meet their full marketing potential through social and digital marketing efforts.

She holds a Corporate Training Certificate from New York University, a Master's degree in Information Systems from PACE University, and an undergraduate degree in Marketing Communications from the State University of New York—Geneseo.

Connect with Becky on Twitter, Facebook, Google+, LinkedIn, or Pinterest. Twitter: [@BM_Livingston](#) [@Penheel](#). Follow the [Penheel Marketing](#) blog to keep abreast of online marketing and social media changes in the marketplace.

Resources

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