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Scott Cytron • Oct. 01, 2009

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Are you a “by-the-book” kind of person, or are you willing to break the rules?

Think carefully! The answer may reveal whether you are open to marketing and branding your firm beyond traditional techniques.

There's nothing wrong with sticking with old-school methods. In fact, many firms believe you don't want to fix something that's not broken. But something that isn't broken could still be improved upon or modified.

Take, for example, doing business on the golf course or attending networking functions. These endeavors are solid ways to build business, but in today's environment, they are only two options in an entire portfolio of solutions. Many of today's methods are low cost and high tech, but all focus on the same technique — reaching out to clients and prospects to be heard above the competition.

SEARCH ENGINE OPTIMIZATION

By now, every firm should have a website, but statistics show that only about 60 percent of firms do (*The CPA Technology Advisor* 2008 Reader Survey). And many of these firms are stuck in Web 1.0 instead of thinking beyond the website-as-brochure scenario. Firms with dynamic sites (Web 2.0+) use a mix of interactive technologies, not for vanity or because it looks good, but to draw attention to their firm. (See www.CPATechAdvisor.com/go/2193 for a review of website building tools for accountants.)

One method to market and brand your firm is through **Search Engine**

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prospects, clients and referral partners to engage them in conversation on topics of interest or meaning. The goal is to provide enough information to incent them to learn more about your firm and services offered, while allowing them to 'get to know' you and your firm prior to making initial contact."

Most firms are aware of social media tools, including [Facebook](#), [LinkedIn](#), [Twitter](#) and [Plaxo](#), but may not be

using them to their potential, or at least collectively as a cohesive unit instead of individually. Similarly, Swanson feels SEO is a derivative of social media, and a technology that is not being used properly — if at all — within firms.

He says "getting noticed" is what SEO is all about. His definition:

Anyone searching for information in Google or any other search engine will find you based on words embedded in your website. Once SEO is a part of your online efforts, reports generated through an Internet Service Provider (ISP) provide practical information you can use to find out who clicked through your site.

"Search engine optimization is a process of increasing traffic to your website as a result of adding dynamic content relevant to the services offered," he noted. "This can be a very effective method of advertising your firm and identifying new leads."

**LEAD GENERATION THROUGH
TELEMARKETING**

Top Five Reasons to Incorporate Email Newsletters into Your Branding & Marketing Strategy

Are email newsletters a relic or are they still valid as a communications and lead-generation tool for today's tax and accounting firm?

Barry Friedman, CPA, and chief executive officer of BizActions (www.bizactions.com)

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“Telemarketing is a unique service that is different from all other approaches used in professional services marketing,” he says. “Direct mail, e-mail, search engine marketing and SEO push out content of potential interest to the prospect, and are all tools designed to deliver a key set of messages about a firm to build the brand and generate awareness about the firm.

However, telemarketing provides the opportunity not only to deliver key messages, but also allows for interaction with the prospect.”

Telemarketing is not without risk. Swanson says the most critical risk of third-party telemarketing is retaining a firm that does not understand the services it is selling. He believes most telemarketing firms can do a great job of calling and selling products or soliciting donations, but there is a specific skill set required to properly represent and sell to a C-level prospect.

Email newsletters help firms stay in touch with clients, while also enabling them to provide relevant, educational information. Leading e-newsletter vendors also support custom branding to ensure that the firm's name and brand is consistent across all collateral.

2. Email Newsletters Support a Cost-effective Delivery Method

(digital vs. print). With rapidly rising printing and postage costs, many firms are abandoning printed newsletters. Technology provides a cost-effective and convenient way to deliver newsletters to clients digitally.

3. They Provide a Flexible Platform.

Email newsletters

are far more flexible than printed materials. Firms can schedule release periods to meet their unique needs, e.g., weekly, biweekly or monthly.

Technology also eliminates the need to back date for printing. In the printed world, it is typical to schedule launch dates weeks out to accommodate for the time required to set up files, print and mail newsletters. A digital

“This means any tax or accounting

platform allows firms to make changes or

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Swanson,

It will leave a lasting first impression that may be hard to overcome.”

The most important component of telemarketing is following up, a step most overlooked by a majority of the accounting professionals with whom Swanson has worked. More often than not, he says the company doing the calling simply makes one call, and when it does not get a call back, the company believes the prospect was really not interested.

“This is simply not true! It could be that they were in a meeting when you called, went out of town, had deadlines to meet or any number of other valid

reasons for not calling back. As a result, I encourage all tax and accounting professionals to consider that their call may not have been returned for very clear business reasons that have nothing to do with the prospect's interest level.”

Swanson's three-step rule: Follow up, be professional and let the prospect know you are interested in their business. “Through professional and consistent

communication

with clients. Click reports are also typically included, providing firms with helpful analytics, such as which articles have the highest click-through rates. This type of marketing intelligence offers more insight into the firm's client base.

5. Readers Have Access to Quality Content. Premium

email newsletter providers offer a comprehensive library of content that can be delivered to a variety of target markets, including, for example, individuals versus businesses. Articles are relevant and timely and enable firms to deliver a robust newsletter without having to invest a great deal of time in writing the content or having multiple newsletter accounts.

follow up, you will be in a position of power to win new work,” he says.

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growing

companies by providing strategic branding solutions, marketing communications, advertising, print and interactive services. He says it's not always necessary to have a drawn-out branding program, especially with today's technologies and social media. For example, he suggests leveraging current behavior in a manner that is focused and impactful to grow the brand.

“If a firm is publishing, speaking or sending alerts, posting these products online in your LinkedIn profile only takes about five more minutes,” says Fisher. “The return on five minutes of posting may result in hundreds of views and a few inquiries. Similarly, if the content is on the company site, adding social widgets to retweet the page or link the URL into a social status can result in rapid viral exposure of the content. Ask your webmaster about dropping the code and icons to your existing pages.”

With a very crowded marketplace, especially with professional services firms, Fisher says marketing requires a greater focus and value proposition than in recent years. Buyers are seeking more from their firms, so firms need to look inward in order to better understand what value they can offer or package.

“Recently a client of ours with depth in business sales/valuations was able to build an index that did not previously exist in the marketplace from past transactions it handled,” noted Fisher. “Through packaging the index data and promoting it on Facebook, in e-mail and on the firm's website, they built an opt-in database of thousands of contacts and prospects, raised traffic to the website, garnered key speaking engagements on the index, grew a fan base on Facebook and built attendance at tradeshow.”

Consequently, Fisher says firms should leverage what they don't know.

“With regulatory changes on the minds of many business owners, legal

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thought leadership in business networks. “Just the act of posting the question is an awareness strategy,” he says. “After compiling the feedback data with the firm’s input, you can hang the findings report on everyone’s profile along with presentations for download. The posting of the report further drives exposure and viral opportunities.”

Getting started in the branding and marketing process is a hurdle Fisher hears about every day. His advice: As you move beyond leveraging current activity, consider anything more as a pilot. “Start with a simple short digital or qualitative customer survey using an experienced third-party branding firm,” he says. “The marketplace will be more open and honest if they are speaking with a neutral party. The act of reaching out to your customers for continual improvement is tremendously impactful, resulting in new service offerings, cross-selling gaps, customer vulnerability and realignment of critical selling messages.”

For more than 20 years, Scott H. Cytron, ABC, has worked with tax and accounting professionals, providing public relations, marketing and communications services. Author of The CPA Technology Advisor’s MarketingWorks column, he works with firms and companies in professional services, in-cluding accounting, healthcare, legal, financial planning, collections and debt, and high-tech. Contact him at scottcytron@cpata.com.

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