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*From the October 2010 Issue*

[If you've already read the part of this column that appeared in our June print issue, you can [click here to jump](#) to the bonus online content.]

In my August 2010 column, I offered some tips for improving email management ([www.CPATA.com/go/2894](http://www.CPATA.com/go/2894)), with the most overriding bit of advice being that, with the ever-increasing amount of email modern professionals receive, it's more important than

ever to be proactive at controlling that influx of communication. This isn't

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To date, Facebook, Twitter and LinkedIn have become the most pervasive and widely adopted social media. I wasn't one of the early bandwagon proponents of these sites for business networking and marketing, but I've come to greatly appreciate the potentials they have, when they are used effectively. By now, even most curmudgeonly non-techies have had at least some interaction with one or all of these social media sites. And upon first glance and experience, it is easy to see them as time-wasting endeavors or even potentially negative influences to firm productivity. There are professionals, however, who have essentially spearheaded the development of best practices, mostly by trial and error. These social-savvy tax and accounting professionals have found real ROI in their use of all three of these websites, with trackable new client wins that have added tens of thousands to their firm revenues.

One of these firms is Bordeaux & Bordeaux ([www.yourcpapartners.com](http://www.yourcpapartners.com)), a Wylie, South Carolina CPA practice run by husband and wife team Chad and Donna Bordeaux, both of whom are CPAs. Chad's early adoption and strategic use of Twitter (where he's [@CLT\\_CPA](https://twitter.com/CLT_CPA)) enabled the practice to gain more than \$30,000 in definitive new client wins over the first few months that he used social media to promote their firm.

How did he do it? By determining what news and information might be of value to small business owners who were also on Twitter. So during the course of the workday, if he ran across an article about a new potential tax or credit for small businesses, he'd post a link to the article and briefly note some insight about how people might be affected. This not only positioned him as an expert on those matters, but also prompted some readers, including existing clients, to contact him for more information about the subject.

One of the keys to his success with Twitter is that Chad and other professionals like Chicago CPA Jody Padar ([www.newvisioncpagroup.com](http://www.newvisioncpagroup.com);

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communication

to those who might find value in their firms' services, and also adds a human/social element to the firm marketing equation.

So how can other professionals replicate the successes that some firms have had with social networking? It mostly comes down to treating the phenomenon (whether Facebook, Twitter, LinkedIn or other) as a form of marketing for the 21st Century. Not using it will not make it go away, but could instead cause your firm to miss out on potential clients and make the practice appear stodgy or non-technologically adept.

Of course, just as not everyone has a marketing mindset and personality, not everyone will be inclined to use social media or, just as important, to have the discipline to use it in strategic ways. There's likely a person in your firm or family that's already using social media and may be a natural fit for helping your practice. If yours is a one-person office, well, you should prepare to wear a new hat because social marketing and networking simply is a necessity of the modern practice. Here are a few guidelines for getting social media to work for you.

## **SIX POINTERS FOR YOUR SOCIAL MEDIA STRATEGY**

1. Schedule Your Activity.
2. Use Apps That Multi-Post.
3. Post Relevant Content with Links.
4. Consider it 21st Century Marketing.
5. Use Groups To Manage Communication.
6. Build Your Online Followers.

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**(Bonus online content starts here.)**

## **Six Social Media Strategy Pointers**

**1) Schedule Your Activity.** Social media is now a part of your firm's marketing, which means it's work, so treat it as work, whether or not it is something you enjoy. By maintaining at least a basic posting schedule, you will ensure that you and your firm are getting exposure on a regular basis. It's also beneficial to think about the business owner followers that you have and when they are more likely to be using a website such as Twitter. For many business users, this is at the beginning of the workday, around lunch and nearing the end of the workday, because it coincides with times when people are looking through their schedules, catching up with online news sites and sifting through email.

**2) Use Apps That Multi-Post.** You don't have to go to Twitter or Facebook to make posts on Twitter and Facebook. In fact, many younger professionals who are active with social networking rarely even visit the sites, because they use applications on their smart phones that compile the sites for them. There are also similar tools for making posts, both for computers and mobile phones, that allow you to enter a post once and have it appear on multiple Twitter and Facebook accounts. Check out TweetDeck and UberTwitter. And in reference to tip #1 above, some of these tools even let

you pre-schedule your posts, so that you can have messages sent out at

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aren't, but which might offer news that affects them. So, run across an interesting article on new credit limits for 2011? Copy and paste a link to the article to share it with your followers, and add a sentence worth of your insight. If your followers are interested, there's a good chance they will reach out to you for advice. Since Twitter only allows you 120 characters for your message, however, use a tool that shortens web addresses into post-friendly lengths, like [www.TinyURL.com](http://www.TinyURL.com).

**4) Consider it 21st Century Marketing.** As I noted earlier, social media is a form of marketing and not a fad. While the specific venues of social media (Twitter, Facebook, et al) will certainly change with time, the phenomenon is not going to simply go away, and as today's younger workers move into decision-making roles, it will be an increasingly valuable media channel for reaching them. So, treat it as work, and try to find the person in your practice with the most natural aptitude for it. And in many cases, it doesn't have to be only one person. Many firms and businesses have found that scheduling multiple persons on the staff to make posts can diffuse some of the extra responsibility, while also having more people engaged in the activity. Four our Facebook and Twitter posts, as well as our blog [www.CPATechViews.com](http://www.CPATechViews.com), we share the scheduled postings between several staff, and then allow the same staff to post additional messages as they want.

**5) Use Groups To Manage Communication.** Just as a firm shouldn't send the same mail or email marketing message to its once-a-year 1040

clients

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followers

is to find other professionals and organizations online that you have an interest

in following, and to interact with them and the other followers of those groups.

And following them and others will often result in them following your posts,

which then exposes you to even more online users.

Technology will continue to change how professionals interact and communicate with clients and prospects, so it's important to keep an eye on how other professionals are succeeding with these tools. As with email, smart phones, texting and other types of modern technologies, effective use (and maintaining sanity) often comes down to basic strategies that can help you proactively manage those communications.

In the Productivity in Practice feature at [www.CPATA.com/go/2951](http://www.CPATA.com/go/2951), I profile another professional who is actively using social media to build and market his practice.

Next month, I'll look at productivity tips for automating search functions and using customized home pages that integrate many communication, calendaring and news tools.

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