

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

**8839**

With information technology our primary focus, there is no way I can claim to be an expert at marketing for accounting firms. However, during the normal course of consulting with firms, we allocate a portion of our interview time in every firm to explore how information technology decisions can impact that firm's marketing efforts, learn what firms are actually doing and take a look at the tools they are using. While the majority of firms have difficulty tending to all the marketing opportunities and tools available, some have done very well in specific instances, which stand out as hallmarks from which other firms can learn and emulate. This article will highlight a handful of marketing technologies and considerations that are working in accounting firms today and that can help your firm get to the next level.

## **Firm Website**

After the signage on your building, your firm's website is the most obvious marketing symbol available to the masses because it is easily searched for on the Internet and is often the first impression that a potential client will have of your firm. The website is an extension of the firm's brand and should reflect the level of professionalism that clients receive, as well as the culture of the firm. Developing your own content is time consuming and can be difficult for most accountants that do not regularly write, so there are service providers that can deliver regular monthly content, annual tax calendars, summaries of the new tax laws, financial calculators, and email alerts. For a listing of website designers that cater to the accounting profession, I suggest you take a look at the review of website builders in this issue (starting on page ??; [www.CPATechAdvisor.com/go/XXXX](http://www.CPATechAdvisor.com/go/XXXX)) and visit [Websites4Accountants.com](http://Websites4Accountants.com).

## **Firm Culture**

Promoting an accurate portrayal of your firm culture is also very important for your

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

## SEO, Blogging & Social Networking

Social networking is one of the more controversial topics in firms because most of the senior partners don't quite understand the nuances of blogs, Tweeting and Facebook, which is similar to the discussions of a decade ago when they were first introduced to the concept of websites. Most marketing-centric firms have a professional presence on the major social network sites so that their brand is extended beyond their website. While there may not be a huge amount of marketing generated from this, it expands the firm name to more websites via links and related connections, which does enhance the firm's status among the search engines. Most of the search engines have a service where the firm can pay to have their firm name listed at the top of their search engine listing when key niche and location terms are searched. In most cases, to get one of the top listings for accounting firms with a niche in a specific region costs less than \$1.00 per "hit," which the vendors take out of a prepaid bank.

It's also helpful to find out when your firm or your people are being searched for or mentioned on the Internet, and one of the best tools is Google Alerts. This is a free service that allows you to receive updates on specific key search terms, which could be your employees, your firm, a competitive firm or specific industry niches. Broader-termed alerts can be delivered on a daily basis or for more specific search terms. They can be set to scour the web and deliver a summery on a weekly basis, which we have been doing for the past five years.

Tweeting and blogging are additional ways that your firm can extend the reach of your brand and increase the number of links with your firm. Blogs do take time and should only be done by personnel that naturally spend time sharing information with others about their specific area of interest. If you have a person that is known as a niche expert (or wants to be), writing a blog that provides solid, useful content is one of the quickest ways to get a following and become known as an expert. Free

blogging services such as Blogger and WordPress are more than adequate for most

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

accounting profession when properly used and the results followed up on by the firm. For firms with a big budget, BizActions is one of the most comprehensive providers that develops solid accounting content and allows recipients (the firm's clients) to determine what they are most interested in, while at the same time providing that information to the firm to follow up on what the recipients viewed. For firms with a smaller marketing budget that also want to develop and control their own content, Constant Contact is an email marketing tool that allows firms to send out professional looking newsletters and automate the subscription process for referrals. Constant Contact also provides social networking support, and even online surveys (another effective tool to increase your firm's knowledge in a particular area). Having the latest survey results on a specific topic can position your firm as the expert in that area. Firms also utilize surveys to gauge customer satisfaction and identify client needs, and there are free tools such as SurveyMonkey and Zoomerang that are very effective.

## Contact Management

For managing client contact information, accounting vendors such as CCH, a Wolters Kluwer business and Thomson Reuters are making their practice management applications the core contact management database so firms should make a comprehensive effort to keep that database reliable and up to date. The best way to do this is to send all contact changes to one well-trained person in administration who updates ALL databases so that they are done timely and consistently.

For managing other marketing lists including non-clients (referral resources and niche listings) and doing marketing campaigns, the practice management products have not yet evolved to meet that need, so many firms end up going to third-party CRM (Customer Relationship Management) products. Vendors such as ACT!, GoldMine, ContactEase and Microsoft CRM have been somewhat successful when

used by the members of the marketing team, but are virtually impossible to get the

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

A final marketing technology that we see utilized by accounting firms is actually placed at the front desk. By setting up a computer screen running a PowerPoint presentation, the firm can market its personnel, services and community activities to anyone who may be waiting in the lobby. These firms pull the elements from their website and use a PowerPoint slide show that fades between informational screens and the firm's logo, and some place the screen in a decorative frame that matches the overall lobby theme.

---

Many accounting firms struggle with their marketing efforts because it has not been a primary requirement for their success in the past. With the current economy being tighter than ever, these firms are now exploring ways to better market their firms and information technology. And when properly applied, these methods will help firms make a better overall impression.

*Roman H. Kepczyk, CPA.CITP is President of InfoTech Partners North America, Inc. and works exclusively with accounting firms throughout North America to optimize the utilization of their accounting applications and workflow in every aspect of their practice.*

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved