

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



Every day, new technology services are being launched that help professional services firms better engage with prospects and clients in cost effective ways. Filtering through all the possibilities and effectively leveraging the technologies is

becoming key to firms' success. While not all inclusive, here are a few focus areas to

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

list. You must be intentional about asking for referrals. Here are some tools to help in this area.

- **NetPromoter** – both a loyalty metric and a discipline for using customer feedback to fuel profitable growth in your business. ([www.netpromoter.com](http://www.netpromoter.com))
- **Skype/Vodburner** – many of you have probably used Skype for video calls with family and friends. You may even use it with your clients. With the Vodburner plug-in for Skype, you can record video calls to capture client testimonials even when you are not in the same location. ([www.skype.com](http://www.skype.com), [www.vodburner.com](http://www.vodburner.com))

## Branding & Design

For many firms, branding and design can be intimidating and resource draining. Projects tend to become delayed and over budget. Branding and design effects lead generation and is vitally important to the image of the firm so this area can't be ignored. With advances in technology, the burden of these products can be minimized by leveraging crowdsourcing. Crowdsourcing is commonly defined as “the act of a company or institution taking a function once performed by employees and outsourcing it to an undefined (and generally large) network of people in the form of an open call.” In other words, you bid out your projects to a community of resources via the Internet completing projects quickly and cost effectively. Some of the leading platforms include:

- Crowdspring ([www.crowdspring.com](http://www.crowdspring.com))
- 99Designs ([www.99designs.com](http://www.99designs.com))
- Elance ([www.elance.com](http://www.elance.com))
- Zerys ([www.zerys.com](http://www.zerys.com))

## Social Media

Although social media has been around for years, too much focus has been given to marketing and not enough focus on how to leverage it for sales. With the

improvements in social media over the last couple years, the idea of cold-calling is

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

affordable options for organizing and coordinating business development efforts. Below is a list of services to consider.

- Microsoft Dynamics CRM (<http://crm.dynamics.com>)
- LexisNexis Interaction ([www.lexisnexis.com/intelligence/interaction.page](http://www.lexisnexis.com/intelligence/interaction.page))
- Salesforce ([www.salesforce.com](http://www.salesforce.com))
- ZOHO CRM ([www.zoho.com/crm](http://www.zoho.com/crm))
- SugarCRM ([www.sugarcrm.com](http://www.sugarcrm.com))
- WorkETC ([www.worketc.com](http://www.worketc.com))

### Digital Messaging

In today's digital world, a website and email marketing strategy are critical to having your message and value proposition heard by current and prospective clients. Too many firms still don't even have a website. And, a large number of those that do haven't received proper attention over the years. Through website building tools, you can have a great looking website for a fraction of the time and cost it used to require. Some of the leading platforms include:

- WordPress ([www.wordpress.com](http://www.wordpress.com))
- Emochila ([www.emochila.com](http://www.emochila.com))
- Squarespace ([www.squarespace.com](http://www.squarespace.com))
- Weebly ([www.weebly.com](http://www.weebly.com))
- Wix ([www.wix.com](http://www.wix.com))
- Webs ([www.webs.com](http://www.webs.com))
- YourMembership ([www.yourmembership.com](http://www.yourmembership.com))

Developing an email communication plan and schedule is also crucial to a well-rounded business development strategy. Despite the effects of spam, email marketing is still very effective for communicating with your clients and generating leads. Below are a few email marketing platforms that range from simplistic to robust.

- BizActions ([www.bizactions.com](http://www.bizactions.com))

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

more powerful and more affordable every day. However, technology can't substitute the core business development skills we've relied upon in the past. You need to train your team on both the traditional concepts as well as the new age technologies to truly recognize success. This will allow your firm to continue to Think, Plan, Grow!

Firm Management • 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