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With information technology being my 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 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 highlights a handful of marketing technologies and considerations that are working in accounting firms today and that can help you reach the next level.

## **1. 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 your 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, take a look at the review of website builders in this issue ([www.CPATechAdvisor.com/go/3026](http://www.CPATechAdvisor.com/go/3026)) and visit [Websites4Accountants.com](http://Websites4Accountants.com).

## 2. FIRM CULTURE

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as well as writing emails to your website.

## 3. 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 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 summary on a weekly basis, which we have been doing for the past five years.

Tweeting and blogging are additional ways you 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

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Email marketing is another controversial marketing topic with most firms today delivering a combination of physical media such as newsletters, along with email notifications. Tools such as Constant Contact and BizActions have done well in the accounting profession when properly used and the results followed up on by the firm. For those 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 those 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. You can 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.

## **5. 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

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members of the marketing team, but are virtually impossible to get the rest of the firm members to use consistently, so they are not recommended as firmwide solutions to be updated by all firm personnel. On a technical gadget note, one technology that has been effective for capturing information from business cards and importing it into contact databases has been the CardScan devices, which are small scanners built specifically for use on business cards, capturing the most common fields and logos.

## **6. FIRST IMPRESSIONS WITH POWERPOINT**

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 themselves and information technology. And when properly applied, these methods will help firms make a better overall impression.

Technology

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