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Social media can be a rewarding place for accounting firms – it provides a platform to build relationships with customers and prospects and, ultimately, grow revenue. And the benefits have never been greater. In fact, a recent study from Sprout Social indicates that after consumers follow a brand on social media, 91% will visit its website or app, 89% will make a purchase from the brand, and 85% will recommend the brand to a family member or friend.

But social media can also be an unforgiving place. Over the last year, we've seen an uptick in social media fails as businesses tried to join conversations about trending

headlines and serious issues – from pandemic developments and racial justice to

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can be as simple as a one-page document that outlines:

- Your social media objectives
- Your target social media audience
- A description of your social media “voice”
- Topics you will/will not address on your channels
- Posting frequency
- Engagement approach
- Who has access to post on your social media accounts
- When and when not to respond to conversations

These guidelines can and should evolve along with your firm. Revisit them regularly to ensure they still complement your overall business strategy.

**2. Be a good listener.** While you shouldn't make posting decisions based on what everyone else is doing, you also shouldn't make decisions in a vacuum. It's important to truly understand a trending situation as well as the “mood” on social media and in traditional media before making a decision about whether to post.

As you evaluate the situation, look at the conversation that's already happening. Are other firms jumping in? If so, what's driving that? How are people responding to that content? Are the stories about firm response positive or negative? Are your customers and prospects joining the conversation? Are they asking you to join? Why? Understanding the landscape can help make a decision that feels right for your business and the moment.

### 3. **Walk the walk.** When the racial and social justice movement gained

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kind of social media posting – either because everyone's attention is elsewhere or out of respect for the situation at hand. For example, many accounting firms we work with paused on posting around the presidential election because that event dominated the social media conversation. And we've advised them to pause during moments of national and world crisis because of the gravity of those situations. Continuing to post promotional content at these moments can imply your firm is disconnected from the world around you – or simply doesn't care. Pay attention to what is happening in the world and pause posting during times of crisis.

**5. Engage with care.** Treat the content you like and share with the same care you treat your own social media content. Before you deem something worthy of engagement, review it carefully. Verify the content's accuracy, check for hot-button language, know your source and review the current comments to avoid an inadvertent issue. For example, a controversial news figure might post something completely neutral on Twitter that you think is relevant to your customers. However, your customers might view a retweet of that post as an endorsement of the controversial figure.

**6. Live the brand.** As a firm owner, you are the brand and anything you post on your social media accounts becomes a reflection of that brand. In a recent New York Times story, journalist and digital communication expert Sree Sreenivasan summed it up well: "The fact is that it's impossible to separate the personal use of social from the professional, and everything you say online can and will be used against you. There are ways in which you can try to safeguard your privacy and control who sees particular content, but the onus is on you to be vigilant. So, the more seriously you can take your social media activities, the better." You can mitigate your risks by embracing the same social media guidelines for your business and personal accounts.

Every day on social media firms of all sizes are judged by what they say and what

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