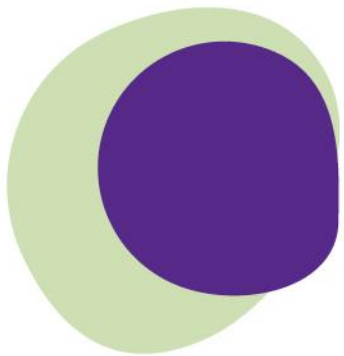




Social Media for Accountants

A Step-by-Step Guide



sage

Introduction

Social Media is for *everyone* – that includes you too!

Social Marketing is the most talked about marketing technique of this millennium. It keeps people talking and asking questions for two reasons. Could it really be as simple as they say? And does it really work?

Social media as described on [Wikipedia](#) “includes web-based and mobile based technologies which are used to turn communication into interactive dialogue among organizations, communities, and individuals.” These technologies are almost always free and are designed almost entirely with the idea of people coming together to share information, opinions and interests on a common platform.

This guide will help weed through some of the common questions and misconceptions about developing a social media plan to use in your accounting practice, starting with the largest misconception of all – that social media isn’t meant for “*my business*”.



Tone of Voice

If you remove the “social element”, it doesn’t work so well

One of the things businesses, large and small, struggle with when embarking on social media for the first time is establishing the right tone of voice. Tone of voice is key to making social media work in a professional sense, and often times people miss the mark.

Keep it real

Whether you’re contributing content on Twitter or updating your Facebook page, the things you say on social media should sound like *you*. The tone in which you contribute content should reflect your personal brand and not be so formal that the “real people” element is removed.

For example, if you have a whitepaper on 401ks you want to share on your Facebook page

DO:	Hey friends. I wrote this whitepaper on 401ks to get everyone moving in the right direction this tax season. Who needs more grey hairs?
DON'T:	Hello clients and fellow colleagues. Please find attached to my Facebook page a whitepaper written specifically about 401ks and the impact taxation changes have made on society. The thoughts and views expressed are more own. I hope you find the information provided serves you well and please consider me and my firm for any future taxation requirements.

Tone of voice is critical to keeping the interaction real and for making sure that the people who follow you, friend you, like you are not feeling like you’re constantly marketing to them.

Tip: If you’re not sure how to master you’re right tone of voice, practice saying what you want to say out loud... and type it exactly how you say it. Sometimes one of the easiest ways to remove formality from writing is to make sure you use contractions the way you would when you speak aloud. Use can’t, won’t, shouldn’t, couldn’t, she’s instead of their more formal alternatives.

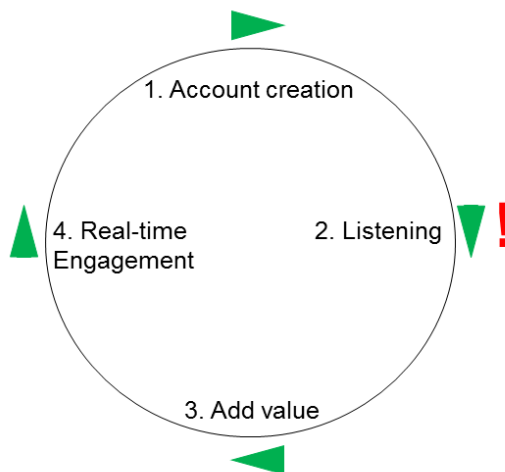
Listen Before You Leap

Think of social media interactions like networking at a party

The very, very first thing you want to do when actioning a social media plan is to LISTEN. Listening and observing should not only be the first thing that you do, it should continue to be at least 25 – 50% of the time you spend participating in social media.

Think of it like a party. You wouldn't walk up to a pack of perfect strangers and interrupt their conversation, would you? You'd approach slowly and with a smile on your face, you'd make eye contact with one or two of the people standing in the circle, and you'd listen to understand what was being discussed and wait patiently for your moment to contribute.

The Twitter Lifecycle



DO: Join a social media site like Twitter, and follow people who have similar interests in business, accounting and software. Look to connect with business owners and prospective clients. You're not going to aggressively "go after" these people with aggressive marketing discounts and offers. You're going to **listen** to what it is they're saying. You're going to learn their language and understand their concerns.

DON'T: Join a social media site expecting to place a megaphone to your mouth (metaphorically speaking of course) and just blast opinion after opinion without understanding your audience.

So many sites, so little time

If you can't be everywhere, what sites should you use?

There are dozens of social media sites and many more seem to pop-up overnight. If you can't be everywhere, where should you be? Each social media site has key strengths so it's important to test each site with your brand and the content you like to share. Also, consider the numbers behind the top four.

Facebook – As of May 2012, Facebook reports more than 900 million active users. Facebook is easily the largest social networking site and should be included in any social media plan just based on reach alone.

Twitter - Twitter is an online social networking service and microblogging service that enables its users to send and read text-based posts of up to 140 characters, known as "tweets". Twitter now has over 140 million active users as of 2012, generating over 340 million tweets daily and handling over 1.6 billion search queries per day.

YouTube – YouTube is a video sharing website the uses Adobe Flash Video and HTML5 technology to display a wide variety of user generated content. As of January 2012, YouTube claims to stream more than 4 billion videos per day.

LinkedIn – Considered the granddaddy of professional networking sites, LinkedIn boasts more than 200 million registered active users in more than 200 countries worldwide. LinkedIn focuses on the professional market by encouraging users to share resumes and connect with contacts both direct and through other connections (second and third degree contacts.)



Tip: Don't recycle content from one site to the next!

Entrepreneur Magazine explained that though it may be tempting, businesses should not copy and paste the same posts on each of their social media websites as many fans of the brand will follow a company's updates on various mediums. Instead use each social media platform for its strength. Share pictures on Facebook, post your video to YouTube, and tweet links to these resources and quick updates.

Facebook

Creating a Facebook Page

A Facebook Page, sometimes referred to as a “Fan Page”, is a page that you can create on Facebook for anything you want... including your business. Think of it as a one page meeting place, with information boards, links, a message forum box, RSS and anything else you want. The best part is... anyone can create one!

An example of a Facebook Page:

The screenshot shows a Facebook page for Sage 50 Accounting 2013. The page header includes the Facebook logo, a search bar, and a navigation menu with options like 'Sage 50 - US Edition' and 'Sage 50 New Features'. The main content area features a post from 'Peachtree' announcing the transition to Sage 50 in May 2012. The post includes a video player and a list of features. The features are:

- Prior Period Account Reconciliation:** Reconcile prior accounting periods without changing the current one.
- Quickly Mark Vendor Records as Inactive:** Streamline your database to save time and improve performance.
- More Efficient Check Printing:** Stop wasting expensive pre-printed checks.
- Sage 50 Business Intelligence with New Inventory Analysis Report:** Real-time inventory for better supply chain management.
- Better Than Ever Sage Payment Solutions:** Now automatically record your debit and credit card payments into Sage 50... Even on the go!
- Sage E-Marketing:** The easy way to help increase sales in a snap.

There are also two call-to-action buttons: 'Feature Videos From Past Releases You May Have Missed' and 'Order Your Upgrade Here'. A cartoon character of a woman with red hair and glasses is also visible on the page.

Why create a Facebook page?

- Facebook limits you to have no more than 5,000 friends or connections on a regular profile page. A Fan Page allows for unlimited “fans” or “likes”.
- Facebook pages typically yield high search engine positions.
- A Facebook page can be viewed by visitors and “non-friends” too.
- A Facebook page allows a degree of separation between you as a person, and your accounting firm. Creating a Facebook Page allows you to focus the content and graphics around your profession.

How do I create a Facebook Page?

Facebook makes building a Facebook Page relatively easy to do. You could have a Fan Page created quickly.

1. Go to www.facebook.com/pages/create.php and choose the category most suited to your page.
2. Identify your business category and include your phone, website, email and all relevant contact information during the set-up process.
3. Upload your company logo into the Profile Picture section. Make sure you are visually creating your brand within the Facebook Page.
4. Make your “About” information meaningful. Again, remember your “tone of voice” and don’t make this information too stuffy or difficult to digest.
5. Start sharing things. Share tips from your firm around tracking expenses; things you recommend your clients watch for on a daily basis; cash flow tips. Make sure you upload pictures. A visual often speaks volumes and is easier to digest than

large amounts of copy.

6. Keep sharing. A Facebook Page won't become a trusted resource if the content stays the same. Post often. Studies indicate that the best time to update Facebook content for visibility reasons is between 9pm and 12am.

Tip: Tell people about your Facebook Page

It's not enough to create the page; you have to drive traffic to it, just like any website. Make sure you post updates on your page so your content can be viewed by the people who "like" your page and by their friends. Make sure you add a link to your Facebook page on your website, on your business cards and as part of the footer of any communications and marketing materials you create.

Tip: It's Okay to mix business and pleasure to a certain degree

There is no secret sauce to using Facebook for business. Creating a Facebook Page for your Accounting firm that offers tips and advice is a great start, but it doesn't need to end there. You can share things about your day in your profile section, such as "*Just met with a lovely new client. Excited to get them out of the shoebox and into a solution that works for them!*" It's not "marketing", it's not even thought leadership. It's just reminding the people you interact with, what you do – and how well you do it! How could you not get referrals then?

Twitter

Creating a Twitter Profile

The first step to getting connected on Twitter, is creating your Twitter profile. Your Twitter profile is your homepage or persona to the other users and potential followers on Twitter. Your Twitter profile can be viewed by your Followers and also is indexed by search engines in search results.



What is a “tweet”?

A tweet is a 140 character update posted from your Twitter profile either online or through a mobile device. The update is shared with your followers and has the potential of being retweeted.



What is a “retweet”?

A retweet is the ultimate social media compliment. A retweet means one of your followers liked your tweet so much, they want to pass it along to their followers as well. It's a way of giving “high five” to someone who shared good content. Being retweeted doubles your exposure. Now your tweet isn't viewed by just your followers, it's viewed

by the followers of your followers, thus expanding your reach.

How to create a Twitter Profile?

Like Facebook, your Twitter profile should offer easy to find, easy to read information about your accounting practice. Your visual profile should be reflective of your brand.

Creating a Twitter Profile is easy.

1. Go to www.Twitter.com and click to **Sign Up**.
2. Fill out the appropriate security questions (password, email etc) and click **Create my account**.
3. The Twitter wizard helps you get started. It recommends you find five people to follow. Of course you can follow as many people as you like but following too many people, too early on has shown to increase the abandon rate of people on Twitter so to begin, keep it small and keep it focused. Search for business groups, thought leaders like large accounting associations, and follow them by click the “Follow” button in the results.
4. Follow the Twitter Wizard. You’ll see as you add followers, you are also beginning to see their “tweets”.
5. Add an image to your profile. Some firms will choose to use their firm logo. Some studies show that using a personal profile picture, like a headshot, gives more personality to your Twitter profile and can be favored by potential followers.
6. Complete a short, easy to ride, benefits heavy bio. Don’t ramble on too much about your services and looking for new clients. That will come in time. Focus on your passion for accounting and working with business owners. Your profile should be up-beat and dynamic.

My profile is created, now what?

Twitter works like the news. It moves quickly and information gets passed fast. All tweets need to be 140 characters so often times links are provided to outside sources for additional information, like webpages or other social media sites.

By creating your followers list you are creating a “newsfeed” of tweets to view. Depending on who you follow, and how often they tweet, varies how much and how fast your newsfeed will update.

If you like what someone posts, pay them the compliment and retweet their post. Not only does this expand their reach, it allows you to share something you enjoyed with your followers. To retweet, click the square arrow icon that says Retweet.

An example of a Twitter page:



How do I get Followers?

Like Facebook, it helps to get followers by telling people you are on Twitter. Make sure your website has your Twitter name @YourAccountingFirm clearly stated, as well as the link to your Twitter profile. Include this information on newsletters, marketing materials, invoices; anywhere your clients or prospects may view it.

Then you need to tweet.

You should tweet about tips or information you'd like to share. You can ask questions and brainstorm ideas. Share a joke. Tweet as often as you'd like, but don't overdo it. Some professional surveys have found about 6 tweets per day is recommended for businesses with less than 100 followers. Increase as you see fit.

Tip: Watch your followers count. If you notice you are losing followers (ie. You had 80 and now you have 70) try adjusting how much you tweet or what the content you are tweeting is.

Tweeting can be a challenge initially as you learn to navigate your way through sharing information in less than 140 characters. You'll figure out pretty fast that providing links is key, as is speaking in a short-hand Twitter jargon. A few things to know, to help you post and read tweets.



What's with all the symbols?

@ Symbol – On Twitter, the @ symbol represents a person/business Twitter name or “handle”. For example, the Sage Accountants Network is on Twitter. This is viewed in a

tweet or referred to as “@SageAccountants”.

Example: Join [@SageAccountants](#) on Thursday in Chicago. We're giving away free Excel books. Ask us how to get one!

Hashtag – On Twitter, the hashtag represents a keyword or trending topic. Hashtags are not to be abused or used too often, but it can be a good way in a tweet to highlight what the tweet is about and to share it with people who share that interest.

Example: Join [@SageAccountants](#) on Thursday in Chicago. We're giving away free [#Excel](#) books. Ask us how to get one!

A few additional tips for being active on Twitter:

- When people follow you, follow them back if appropriate. You don't have to, but it's a courtesy and makes sense when building relationships. You want to share your content, and in return you want to see your followers tweets as well.
- Post links to your website for “more information”
- Remember your tone. It's okay to share a joke.
- It's not all about you! Remember, Twitter is about networking and learning. If all you do is talk about your firm and your services, you're going to lose followers pretty quick. Share information and tips. Retweet thought leaders.
- Ask questions. Twitter can be interactive. Ask a question and wait to see what your followers respond.

Conclusion:

Engaging in Social Media

Participating in social media is a fun, relevant way to connect with friends, clients, colleagues and prospects. Your firm should invest in a Facebook and Twitter account right away. It is a great way to get your brand out there and connect with followers.

The benefits of social media are far vast and can be far reaching. The casual atmosphere of Twitter and Facebook remove the “marketing” element from the interactions and you can connect and give advice to clients and prospects without all the pressure to buy.

Plus, the question now is “how can you not be on social media?” Managing your brand and staying aware of your competition and detractors is critical. If you upset a client, chances are they may express it online. Be where they are and act proactively to mend fences and monitor your brand. It benefits your clients who can interact with you on their terms and on their time and it benefits you and your brand to be out there connecting, monitoring and interacting.

