Marketing nirvana

This book should be in the hands of every accountant! fantastic

An incredibly useful resource

A must-read for all accountants

Essential reading

This book holds all the secrets

The *Ultimate* Young Accountant's Marketing Checklist

The Renowned Step-By-Step, Year-By-Year Process For Accountants Who Want To Develop Clients.

> **ROSS FISHMAN, J.D.** Edited by Jennifer Cantero

THE ULTIMATE YOUNG ACCOUNTANT'S MARKETING CHECKLIST

The Renowned Step-By-Step, Year-By-Year Process for Accountants Who Want To Develop Clients

Ross Fishman

Chief Executive Officer Fishman Marketing, Inc.

Edited by:

Jennifer Cantero

Director of Marketing & Sustainability Sensiba San Filippo LLP This .pdf is licensed only for firms that are members of **MSI Global Alliance.**

Please do not circulate.

© 2020 Ross Fishman

Want a webinar for your firm?

We are offering to law and accounting firms the popular webinar described below, plus an "Ultimate Marketing Checklist" book for every professional. To learn more, contact Ross at +1.847.921.7677 or ross@fishmanmarketing.com.

"20 Top Marketing Tips During COVID and Beyond"

Summary:

Ross Fishman is one of the world's foremost experts on marketing for lawyers and law firms. In this fun, fast-paced, and highly rated webinar, Ross will share 20+ powerful marketing tips—his favorite practical suggestions that lawyers who dealing with the COVID pandemic and its aftermath can begin using *immediately.*

Hot Topics May Include:

- Developing a 2020-21 Marketing Strategy
- Standing Out Online
- Networking From Home and Online
- Efficiently Developing Online Content
- Social Media Best Practices
- Top LinkedIn Tips
- Developing a Specialty Niche
- Better Zoom Meetings
- Mental Health Issues
- And much more...

Legal Marketing Books:

Every professional will receive one of Ross's new "Ultimate *Marketing Checklist*" e-books.

About the Speaker:

Of Counsel magazine said, "Many people consider Ross to be the nation's foremost expert on law firm marketing." A former litigator, big-firm marketing director, and marketing partner, Ross is a renowned expert in law and accounting strategy and branding. He was the first marketer to be inducted into the Legal Marketing Association's (LMA) Hall of Fame. Learn more at *LinkedIn.com/in/rossfishman or at fishmanmarketing.com*. Go to *t.ly/Dj5Y* to watch Ross's speaker demo, and *t.ly/eN8vn* for "250 of the Best and Worst Law Firm Brands in Two Minutes."



Additional Books by Ross Fishman

WE'RE SMART. WE'RE OLD. AND WE'RE THE BEST AT EVERYTHING. The World's First No-BS Guide to Legal Marketing and Branding.

THE ULTIMATE LAW FIRM PARTNER'S WORKING-FROM-HOME MARKETING CHECKLIST

The Renowned Step-By-Step Process For Lawyers Who Want to Develop Clients

THE ULTIMATE WOMEN ASSOCIATES' LEGAL MARKETING CHECKLIST

with Susan Freeman, M.A.

THE ULTIMATE LAW STUDENT GET-A-JOB CHECKLIST

Edited by Kerriann Stout, Esq.

THE ULTIMATE GUIDE TO STAYING SAFE IN YOUR TEENS AND 20'S

Real-Life Rules to Surviving a Pandemic, Underage Drinking, Illegal Drugs, Talking Your Way Out of a Ticket, Painless Police Stops, Sexting, and Social Media

Available at fishmanmarketing.com and Amazon.com



Testimonials

"Unfortunately, accounting curricula still doesn't include marketing courses, which are essential to helping you develop a practice and ascend to partnership in a firm. Reading this checklist and keeping it handy will help you immensely in your career with its practical tips. Get a jump start on your peers and put your career on the road to success."

Mike Bowlan

Principal, Industry Services Brown Smith Wallace

"This practical book shows a clear path to a very successful career in professional services. If a young staff person can do just half of what is laid out, they will be well on their way to Partner."

Brian Falony

Marketing & BD Director, Brady Ware & Co.

"Public accounting is not only about the numbers; it's about the relationships you build throughout your career and how those connections affect you today and in the future.

> The adage, 'it's not what you know; it's whom you know' still has legs."

Christopher Menz Partner-in-Charge/Practice Growth Brown Smith Wallace

THE ULTIMATE YOUNG ACCOUNTANT'S MARKETING CHECKLIST

The Renowned Step-By-Step, Year-By-Year Process for Accountants Who Want To Develop Clients

Ross Fishman, JD

CEO, Fishman Marketing, Inc.

©2020 by Fishman Marketing, Inc. All rights reserved.

Published by Ross Fishman Highland Park, Illinois fishmanmarketing.com

ISBN: 978-1-9834469-8-6

Manufactured in the United States

Cover design by Michelle Benjamin

No part of this document may be reproduced or transmitted in any form by any means, electronic or mechanical, including photocopying, recording, or by information storage and retrieval system, without permission from the publisher.

Dedication

This book is dedicated to the hard-working young accountants who strive to master a complex and challenging craft. They work long hours for demanding clients, both inside and outside their firms. They graduated into an uncertain economy, in a profession with high professional expectations but low client loyalty. Controlling a book of business is the only professional safety net that exists.

In today's economy, many young accountants are opening their own firms or working in small firms that ask them to bring in new clients very early in their careers. We recommend these same strategies for those professionals but suggest that they apply them on an expedited time-frame, get out with people, and start developing that niche focus immediately.

It is equally dedicated to all the in-house accounting marketers who toil in the trenches every day, helping their accountants, professionals, and firms succeed. They're among the smartest and most generous professionals I've ever met; I'm blessed to call them my friends.

Book Overview

Marketing's not tricky. Plan, prepare, and execute steadily over time— a little bit every week— drip, drip, drip. Just make sure the things you are doing are the right things. That's what this book is designed to facilitate. Here's the basic overview:

- Learn to be a competent accountant, emphasizing both technical skills and client service.
- Seek to pass the CPA exam as early in your career as possible. You can't just bring in the work; you must be able to do it too. The further you get from school, the harder it can be to get back to a test-taking mode.
- Create your long-term marketing infrastructure, social media platform, and other tools you'll leverage through partnership and beyond.
- Join a local CPA society or other professional association. Meet your peers, get active, enhance your skills, and build your resume.
- Gradually add more external marketing and networking activities. Develop your personal brand.
- Create a narrow specialty or industry niche in an area you enjoy. Avoid becoming one more generic generalist; seek to dominate something. Focus your marketing on a specialized trade, industry, or professional group where you can become widely known as the friendly, helpful, go-to market leader.
- Look for additional cross-selling opportunities with existing clients.
- As you gain experience, look to spend more time out of the office with prospects and referral sources.

That's the big picture; the rest of the book will detail the specific activities. If you ever have any questions, shoot me an email at ross@fishmanmarketing.com. I'd be delighted to hear from you.

Table of Contents

Preface	1
Introduction	5
First-Year Accountants	9
Client Service	13
Social Media Tools	17
Business Cards	29
Second-Year Accountants	31
Third-Year Accountants	35
Fourth- and Fifth-Year Accountants	41
A Plea to Focus Your Marketing	43
More Activities for Fourth- and Fifth-Year Accountants	55
Presentations and Webinars	59
SlideShare	63
Sixth-, Seventh-, and Eighth-Year Accountants	67
Visiting Clients	71
Networking and Attending Seminars	73
Conduct a "Needs Assessment."	79
Your Mental Health	83
General Mindset	87
In Conclusion	89
Ross Fishman Biography	90
Jennifer Cantero Biography	91
Appendix	93
Drafting a Persuasive LinkedIn Profile	94
How to Write for the Internet and Enhance Your SEO	100
Writing a Great Website Biography/Profile Page	102
 Writing an SEO-Enhanced Practice-Area Page 	105
 Writing an Effective Industry-Group Page 	107
Individual Marketing Plan	109
Target Marketing Worksheet	113
Acknowledgments	117

Preface

Accounting is a challenging, competitive profession; many accountants live in a constant state of unease. They want to know how they're doing, how they compare to their peers in their firm and across the profession. The anxiety doesn't go away as they advance through their careers. It often increases, as they wonder if they're doing everything they can to improve their chance of partnership, including developing their own clients.

For many years, smart, personable, highly motivated junior and senior managers have worked tirelessly on client development with little to show for their efforts. After a review session with a professional marketer to discuss their previous marketing efforts, it's often apparent that the activities they'd been undertaking had little chance of success. Not to be discouraging, but usually, it's pretty evident that their efforts were never going to work. It's rarely their fault; they just got bad advice. Or no advice at all.

This process can be a continuous cycle, with firms conducting their marketing training using their successful rainmaking senior partners. The logic is that they *must* know how to do it because they have heaps of business. It makes sense in theory— but it rarely works in practice. Accountants are hungry for practical, realistic advice and assistance.

The guidance they often receive from their bosses and mentors tended toward "Here's what *I* did [i.e., 30 years ago, before the internet]." Marketing is often seen as something that accountants need not worry about until they have several years in the profession. Sometimes they are even discouraged from building marketing skills until they have reached into the ranks of management, and this is simply too late.

I have participated in hundreds of accounting and law firm marketing training programs and retreats, many of which included presentations by firm rainmakers, only a handful of whom could effectively help their younger staff.

Candidly, most of these rainmakers have no idea *how* they generated the business. They might *think* they know, but it's just their gut feeling. They know *something* worked, but rarely what it was.

Social worker Andrew Fishman, LSW connects this to "'survivorship bias,' which— people who succeed often attribute their success to the wrong things. Just because you happened to live to 100 doesn't mean that it was *because* of the cigarettes you smoked every day — it was more likely in *spite* of it.

"The well-intentioned rainmakers probably have no actual idea *why* they succeeded; they just assume that they made all the right choices and are happy to recommend them to anyone who will listen — even if it's terrible advice."

If a rainmaker *can* comprehend and distill down all of the behaviors that led them to become successful into meaningful tips for their younger professionals that will not guarantee that they will work for people who have different skillsets and life experiences. There will likely need to be some adaptation to suit their unique goals and align with the relationships they have built with their peers, prospects, and clients. The challenge is that the rainmakers may have neither the insights nor the experience to identify just how and when to apply adaptive methods.

Further, a lot has changed since a 60-year old senior partner was building his or her practice. Back then, it was a seller's market for accounting services. The Big Four weren't as diversified, powerful, or influential on business as they are today, and there were no overseas outsourcing options. No Google or social media. You could hear the clacking of adding machines and the secretaries' typewriters.

It's hard to credibly offer networking advice to a 30-year-old professional when your LinkedIn profile has no text, one connection, and you don't know your password.

Typical laments include:

- "What she *really* did was inherit a book of business from a retired partner."
- "[Joe Rainmaker] is charming, funny, and the life of the party; he's hanging out with prospects every night and has a six handicap. I'm introverted— his methods are never going to work for me."
- "She keeps saying, 'Good work is the best marketing.' What, our competitors don't do good work too?"
- "He says he gets clients by 'providing excellent client service,' but his dad is CFO at a Fortune 100 company!"
- "He made one friend in his whole life, and *that* guy became CFO of a big bank and gave him all his internal audit work. That's not a strategy, that's dumb luck."

So, without specific guidance or a practical road map, accountants' business development activities tend toward accidental, occasional, and opportunistic rather than planned, proactive, and strategic. It is painfully clear: they need a *plan*. And betting their future success on happenstance, providence, or the fortuitous death of their mentor won't cut it. "Hope" is not a strategy.

I have conducted countless firm retreats and trainings with both firms and global networks of firms on six continents. I've seen the same nervousness in professionals at nearly every single firm, from Istanbul to Iceland. From Ghana to Gary, Indiana.

Accountants and marketers alike need a simple, practical, and detailed guide that they can follow. A step-by-step, year-by-year list of precisely what marketing and business development activities to undertake to help avoid inefficient floundering and increase the chance that they'll have their own business when they need it.

What follows is that guide.

Introduction

Big Picture: As a new accountant, your goal should not be to bring in work, but to master the skills you need. First, to be a competent accountant. Second, gradually and systematically, over time, build a productive and robust network of 250–500 contacts who hire accountants, influence the hiring decisions, or refer business to them. You will be able to leverage them later when you need to create business opportunities or generate work. Clients rarely, if ever, hire a staff accountant for their audit, tax, or business-process review work; you simply don't offer enough coverage if an engagement were to go awry.

Instead, spend these critical early years seeking out mentors who can expose you to the process of earning new work. Find individuals who will take you to meetings with prospects and help you to build your resume, reputation, and name recognition within a significant, specific target audience.

Note: In the longer term, the likeliest path to having a sustainable, portable practice is to become one of the go-to experts in a small niche industry or sub-subset of a broader industry. Clients declare "industry expertise" to be among the traits they value most in their accountants. Your goal shouldn't be "more marketing," but rather, to become a member of the "automatic short list" for some type of accounting services. Don't seek to "get your name out there," but instead to dominate a narrow specialty area.

For example, a wildly successful partner at a leading Midwest accounting firm had grown up in a "car family." He took his life-long experience to become the go-to provider of accounting services for car dealerships across the Midwest. His dealer prospects valued his rooted personal knowledge of the challenging business and strategic issues they regularly confronted. Inventory financing, service department profit, back-office fraud — these were his go-to topics with prospective clients. (We discuss this strategy in greater detail below, under "A Plea to Focus Your Marketing.")

As a young staff member, focus on helping people, not looking for accounting work.

You want to be viewed as a knowledgeable, trusted, industry insider, not a needy salesperson. Build a large number of close relationships following the steps below, and you'll significantly increase the chance that you'll have your own clients when you need them. In all your networking, remember, as a friend once said, "It's better to be interested than to be interesting." Be interested in them and in facilitating their success, more than being the center of attention. Just because the stereotypic rainmakers are gregarious doesn't mean that's why they get hired. Being outgoing helps grow their network, but they get hired because they are good at listening and finding ways to help people solve their problems and achieve financial success. That's something anyone can do.

There are many old sayings about selling that are as true today as when they were first spun, and the most successful people in professional services live them every day:

- "When you're talking, you're not selling."
- "The two most important words in a salesperson's vocabulary are shut and up."
- "Don't broadcast when you should be tuning in."

This list is extensive, but it's not intended to be all-encompassing or mandatory. You needn't follow every single step. If you don't want to give speeches, for example, if that's not your thing, that's entirely okay. Maybe do a little more of some of the other items. Just be intentional, deliberate, and consistent over time.

Ross's First Rule of Accounting Marketing: "You don't have to be great. Just don't stink as bad as your competitors."

Marketing's not hard. It's just hard work.

As Woody Allen said, "80% of success is showing up."

You can do this. Show up.

First-Year Accountants

Mindset:

Become a competent accountant.

Build the basic elements of your marketing platform.

Your number-one priority is to learn to be a skilled accountant; external marketing isn't critical yet. Your only proactive, external activity should be ensuring that you don't lose touch with the people you already know. Maintain relationships with friends from college and grad school, your hobbies, and any organizations you belong to. Create a reminder to ensure that you've had some contact with your chums once per quarter. Your future self will thank you.

During this year, you should create the underlying platform you'll be working from over the next few years, the infrastructure you'll gradually expand over time:

- □ Join one state or local **Society of CPAs** and get involved and serve on *one* targeted educational committee within your practice area.
 - Meet your peers.
 - Learn your craft.
 - Invest in your profession.
 - Your longer-term goal should be to chair a small committee during your fifth year.
- If the CPA Society route doesn't interest you, join an association, trade, or industry group that your firm supports. Attend meetings regularly and get to know people.
- Read your firm's website, internal website portal, blogs, newsletters, LinkedIn or Facebook pages, and other marketing materials to learn about its range of services and clients.
 - Read your senior managers' and partners' biographies and profiles, to learn about their practices and outside interests. This information will come in handy later.
- Build your brand within your firm. Focus on internal marketing by developing relationships with your firm's professionals, both inside and outside of your practice area.

- Do not spend your career eating lunch at your desk. Go out at least:
 - Once each week with a peer inside your service or practice area.
 - *Twice each month* with a peer outside of your service or practice area.
 - *Regularly* with friends and contacts.
- Monitor your office visitor list.
 - Stop by and introduce yourself to the professionals visiting from your firm's other offices.
 - If there is time and it's appropriate, ask to grab a coffee.
- Draft a detailed website biography, following the firm's format.
 - Update it regularly, especially when your practice is developing.
 - o Ideally, you should update it every time you master a new skill, conclude an engagement, publish an article or blog post, give a presentation, are appointed to a committee, *etc*.
 - o Update it thoroughly at least every six months.
 - Be judicious with what you include.
 - o Delete all items from high school.
 - o Be sensible regarding college activities.
 - Delete any *Who's Who* directory "honors" or other questionable accolades. See the blog post at <u>t.ly/3STB</u>.
- Build your network. Create a mailing list spreadsheet of friends and contacts. If your firm has a CRM system, get trained, and add your contacts into the system. Opt for more, rather than fewer people, when deciding whom to add.
 - Classmates
 - Childhood, high school, and college friends
 - Former colleagues

- Community association and professional club contacts
- Parents of your children's friends and contacts through your children's activities
- People you meet at professional and networking events you want to keep in touch with and will see again
- Keep in touch with your existing network, leveraging both traditional and online tools.
 - Events, newsletters, holiday cards, breakfasts, lunch, drinks, phone calls, etc.
 - Social media, like LinkedIn, Facebook, and Twitter
- □ Sign up for **Google Alerts** at <u>google.com/alerts</u> or Mention at <u>mention.com/en</u>. See video at <u>t.ly/Ggoa</u>.
 - For the Search Terms, use: "your name" and "your firm's name" (include the quotation marks).
 - Consider also creating alerts on friends, relatives, and prospects.
 - Drop them a quick email when you see them mentioned.
 - Even more powerful is a short, handwritten note. Weigh the response speed via email, text, Slack, Facebook, etc. with the visceral impact of a handwritten letter.
 - Reach out to your performance manager, niche leader, or service line partner-in-charge to identify other alerts and news feeds you may want to subscribe to or follow. Contact your local public library and enlist their research librarians. They can be a valuable asset.
- Before you engage in any marketing or social media, review your firm's social media policy.

Client Service

- Develop a reputation for providing the highest-quality client service.
- Remember, the profession is full of smart, technically skilled accountants.
 - Clients genuinely value those who excel at communication, timeliness, and accessibility.
- Keep clients regularly informed regarding the current status of their matters.
 - Send them copies of all relevant correspondence.
- Always call clients back promptly, ideally within two hours. Better, ask each client how soon they like their calls returned and meet their preferred schedule. There's no onesize-fits-all solution to client service.
 - Consider: if you have a sick child, how would you feel about a pediatrician who has an "All calls returned within 24 hours" policy?
 - Change your phone message regularly to inform callers regarding your current availability.
- Have a system in place that ensures that someone responds promptly when you are unavailable. For example, some accountants have their assistants check their phone messages regularly when they can't.
- Give clients and prospects your cell phone number.
 - They will appreciate the offer and won't abuse the privilege with late-night or weekend calls.

"A good question to ask all clients at the beginning of a relationship is, "What do you consider 'end of day' - 5:00 pm EST, 5:00 pm PST, midnight?

It can change for every person, which could be a deal-breaker if you are tardy with work product, or force someone to work into the evening when they had expected to receive the document from you earlier."

-Dave Bruns Director of Client Services, Farella Braun & Martel

- Instead of merely meeting your client deadlines, try to beat them by at least a day or two. Don't leave clients sweating about whether their critical document will arrive on time. They'll feel much better without the added stress. Simply docket the deadline earlier and work toward the artificial date instead.
 - This works for your internal audience as well.
 - Strive to consistently beat the work deadline, giving the senior manager or partner more time to review or work on it. They'll look favorably on this.

Social Media Tools

Accountants have been using social media platforms like LinkedIn, Twitter, and Facebook to build their reputations and enhance their relationships for many years, supporting their face-to-face marketing efforts.

LinkedIn

"LinkedIn currently has over 610 million members, with 303 million active monthly users, 40% of whom visit the site daily. Ninety million senior-level influencers and 63 million decision makers use LinkedIn" (t.ly/Wvyz). It is the most important social media tool for professionals, the one preferred by accountants.

LinkedIn is your professional digital business card and a vital tool for your personal marketing. It hasn't quite taken off as a cold-call platform, but it is excellent for staying connected with your referral sources and clients. It's where you'll post articles and updates and connect to your growing network.

Today, nearly everyone you would want to hire you in any capacity will first skim your LinkedIn profile to learn more about you. Make it persuasive and professional. Show them that you're more than a dispassionate one-page resume or standardized firm website biography. This is the opportunity to have your targets see how wonderful you are to work with and how lucky they'd be to have you on their team.

- If you don't have a LinkedIn page, create one that is robust and can appeal on a variety of levels to a broad base of readers. This will be your most important social media platform.
 - Draft a detailed LinkedIn personal profile.
 - Be sure to establish your purpose and personalize your page.
 - Write in the first person and use a friendly, casual tone.
 - Infuse it with your vibrant personality.
 - Ensure there are no typos. Zero. None.

- o A single typo could be disqualifying.
- o Have a friend proofread it for you.
- Create a custom public profile URL, so it doesn't include a bunch of random letters and numbers.
 - o Mine is linked.com/in/rossfishman.
 - o Learn how by going to <u>t.ly/5PIGE.</u>
- **G** Fill it out completely.
 - Don't identify yourself as "Partner at XYZ Firm" in the heading space. Consider this your attention-grabbing headline — intrigue your visitors with something differentiating, using keywords that prospects searching for an accountant on LinkedIn might use.
 - Thoroughly fill out the About, Experience, Contact Information, and Education sections.
 - The two most essential areas are About and Experience.
 - The About section is the very first thing people will read after your name and headline. Use this to tell your personal story, identify your specialty niche, (discussed in detail below under "A Plea to Focus Your Marketing"), and interest readers to learn more.
 - "Craft a summary that speaks not just to the work you do but who you are as a person, including charitable and volunteer work whenever possible." -Lisa Vicine, CMO, Arnall Golden & Gregory
 - o The Experience section allows you to discuss your current work and highlight all the exciting ways you have built up your brand.
 - Read "Drafting a Persuasive LinkedIn Profile" in the Appendix.
- Build a sizable LinkedIn network; work toward hundreds of connections.
 - Start by connecting with people you know personally, such as family, friends, peers, acquaintances, and

classmates from all of your schools.

- Your goal is to get to "500+" connections as soon as possible. Once you hit 500 connections, LinkedIn just shows "500+" on your profile. This works as social proof to others that you have an established professional network.
 - o Another school of thought prioritizes quality over quantity. Use your judgment.
 - o Join your college's LinkedIn group, and connect with anyone you know.
 - o Consider starting a group for your business school's graduation class.
- Join your firm's LinkedIn group.
- Once you have a complete profile and established network, you can start reaching out to other people you'd like to connect with, such as professors, speakers you've heard at events, and individuals who work at firms you are interested in, etc.
- Consider adding most of the people you encounter in your professional life. Lydia Bednerik Neal, VP of Marketing Services, Blattel Communications offers:
 - "Always include a personal note reminding new contacts how you know each other and wishing them well in a unique way. If they accept the invitation, follow up with a short note to suggest a phone call. Check out if they belong to any online groups that would be beneficial to join. Watch their posts and 'like' or comment as appropriate to signal you are engaged and care what they have to say.
 - "You can share your own stories and respond to other people's posts, but the real magic is in the one-to-one conversations, even when in the public or semi-public sphere. As always, you should be authentic and thoughtful."

□ Add a quality photograph.

- An inexpensive passport photo from Walgreens will suffice. Don't use the same picture as your firm's website bio if you can avoid it; Google doesn't like to show the same photo twice when providing search results for your name.
 - o Dress like you would for a professional networking event.
 - o Smile. Look like someone they might want to work with.
- No cropped vacation, party, wedding, or group photos.
 - o Nothing cute, grainy, poorly lit, far away, or blurry.
 - o No children, pets, or props. Be smart.
- Add an interesting background banner photo behind your round headshot, something that reinforces your industry niche or practice area.
- If you have an existing LinkedIn page, now is an excellent time to update your page. Do a thorough audit to ensure it is highly professional.
 - Sanitize it, so there's nothing a 65-year-old client or the most conservative senior partner would find offensive.
 - Be judicious in what you include.
 - o Delete all items from high school.
 - o Be sensible regarding college activities.
 - Review the privacy settings for your profile. You want your profile to be set to "Public" so that people can see and connect with you.
 - However, keep in mind that anything you "like" or "comment" on will be visible to anyone in your network, so use discretion.
 - Post occasional relevant updates, including thought leadership pieces you have written in your chosen area of specialization or focus.
 - o It's easy to start by sharing or liking things that others in your firm, specialty area, or professional

network have posted. This will also visibly reinforce your commitment to this area.

- o Remember, listening and engaging with what others post is as important in social networking as what you say and post.
- No one expects your profile to be very long; just write simply and proficiently.
- Update it regularly, *at least* every few months, especially when your career is developing.
- Ideally, you should update it every time you publish an article, give a presentation, are on a new committee, etc.
- Check it at least weekly.
- Regularly "Endorse" your classmates, friends, and peers; it only takes a click. They'll typically endorse you back. Create evidence that you are well-liked, a leader among your group.
 - A word of caution with Skills and Endorsements: When you receive an endorsement from someone for a specific skill, only post it on your bio if you have actual expertise in that area.
 - When in doubt, leave it off.
- Note when members of your network change jobs or celebrate a birthday or work anniversary.
 - Use that as a personal opportunity to connect and congratulate them.
 - Anyone whose LinkedIn profile you visit will receive a notification that you'd been there.
 - You can turn this off and browse in Private Mode.
 - o See <u>t.ly/OgYzJ</u>.
- If you have the budget, consider buying LinkedIn's Sales Navigator tool.
 - Who do you know whom I'd also want to know? Team Link Extend is a LinkedIn feature that allows you to

see the connections of up to 1,000 of your colleagues, alumni, or board members.

- Daily News Feed. Your existing LinkedIn feed provides automatic updates regarding your friends, colleagues, business school classmates, et al., like a Facebook version of your LinkedIn page. You can create "professional" versions of your LinkedIn page via Navigator.
 - Rather than sending connection requests to prospects, use LinkedIn's "Save Account / Save Lead" button.
 By saving, you're tracking your target accounts' posts and anyone you'd like to follow within those accounts, without having to reach out to those individuals directly.

Twitter

Twitter is a simple, quick, efficient platform to connect yourself to your specialty area online. Just 280 characters, including spaces — a couple of casual sentences and hashtags. It is an ideal communications platform to help build your brand and contact with others in a specialty area or industry niche.

- □ If you don't have a **Twitter** account, create one under your name.
 - For example, I'm @rossfishman (follow me!).
 - Check it occasionally.
- "Make sure to keep your private Twitter account separate from your professional Twitter account. You will not want your professional Twitter account to reflect any of your personal opinions, perspectives, or preferences that could alienate or offend existing and potential clients. Keep your professional Twitter posts just that ... professional."
 Lisa Vicine
 - Other marketers recommend using one single Twitter account for both personal and professional purposes. This would mean tempering your personal posts to ensure they are always appropriate for your professional audience.

- Build your Twitter network; connect with your peers, professors, industry contacts, and thought leaders.
 - Follow people, companies, associations, and organizations within your business and specialty niche areas of interest.
- Post at least weekly on something relating to your job or interests.
 - Retweet tweets that resonate with you.
 - Remember to include the narrow search engine optimized (SEO) keywords that the media and experts in this industry or area would use to search.
 - Ensure you learn the nuances of the jargon.
 - Posts with photos or graphics get significantly more attention.
- If you enjoy Twitter, follow the journalists who cover your practice area or industry.
 - Engage with them occasionally.
 - Build relationships with journalists who may ask you to act as a resource for articles.
 - Offer to provide expert commentary on current business or industry developments.
- Consider utilizing Twitter as a *listening* platform to better understand clients, prospects, competitors, scholars, and more.
 - Pay attention to what they are promoting, discussing, and commenting. It can all be valuable.
- Follow people, companies, associations, and organizations within your professional, business, target industries, and general areas of interest.

Facebook

Consider Facebook to be a defensive strategy. You're unlikely to positively influence decision makers using your personal Facebook profile, but an unfortunate post or photo could eliminate you from consideration. Don't risk it.

- □ If you don't have a Facebook page already, create one.
- If you do have a Facebook page from college, grad school, etc., do a thorough audit to sanitize it and ensure it is now professional.
 - Upgrade your privacy security settings to hide from prying eyes.
 - Delete any party photos, etc.
 - Delete anything a conservative senior partner could possibly find offensive.
 - o If you wouldn't proudly show it to your grandmother, *delete* it.
 - Keep it casual and sensible. This is a less-formal medium than LinkedIn.
- If you enjoy Facebook, consider creating a new public Facebook page as a platform to support the professional brand you're creating.
 - Add occasional updates and photos of your specialty events, speeches, meetings, etc.
 - You can post similar content here that you would post on LinkedIn.
 - Connect with your friends, especially those from business school.
 - Consider connecting with clients, prospects, and referral sources with whom you have a personal relationship.
 - Join your business school class's Facebook group.
 - Check it at least weekly.
 - Keep it casual and sensible.

- Check it at least weekly.
- Join your school alumni Facebook groups.
- Connect with your friends.

YouTube

Video is increasing in popularity with accountants seeking to spread their message; it can be a powerful marketing tool. YouTube is the second-most frequently used search engine, after Google.

- If you have a YouTube account, analyze it carefully for any videos that do not support your professional strategy.
 - Hide, delete, or mark "Private" any videos that do not exemplify the persona you are trying to create.
- Be careful with any videos you Like or comment on and what channels you follow because this could be visible to others.
- Create a new YouTube account for the short specialty videos you may soon be creating.
- □ You can shoot high-definition videos with your smartphone.
 - Buy an inexpensive tabletop tripod and spring-clip smartphone holder. You can find them online for \$10.
 - No one expects cinema-quality movies, but poorquality audio and lighting can destroy the impact of an otherwise valuable video. Invest in a high-quality external microphone and some soft lighting to fill in the shadows, so you're not a dark silhouette, e.g., t.ly/qmB39
 - Consider creating a series of 1-3-minute videos that offer updates on hot topics in your areas of specialization or personal interest.
 - It's easier than you think; if you fumble your language, simply delete that video and start over.
 - Help prospects find your videos. Carefully tag, caption,

and describe them with the SEO-friendly keywords that prospects who are searching for useful content would use.

Instagram

As with Facebook, most business accountants will want to use a defensive strategy with Instagram, although it seems to be growing in importance for firms marketing to a younger audience and recruiting. It can be particularly useful for personal branding and showcasing your specialty or industry interests with posts about where you've been and with whom you've connected. Be aware that your personal profile may show up in a basic search of your name.

- Analyze your Instagram profile. Do a detailed audit to sanitize it.
 - Consider making your profile private or change your Instagram name.
 - Delete any party photos, etc.
 - Delete anything a conservative client could possibly find offensive.
 - o If you wouldn't proudly show it to your mother, *delete* it.

Business Cards

- □ *Always* have business cards with you.
- They may seem old-fashioned to some, but they remain a vital part of today's networking.
 - A quality card looks professional, and you want to be ready whenever you meet someone who could turn into a valuable lead or connection.
- Cards remain the simplest, most tangible way for people to remember you and contact you later.
- Don't leave your business cards to gather dust in your bottom drawer; they can't help you unless they're with you. Here's how to guarantee you have cards when you need them:
 - Leave 75–100 in the box in your desk, then divide up the rest among all of your pants pockets, suit coats, blazers, jackets, overcoats, purses, gym bags, briefcase, backpack, suitcase, roller bag, and glove box.
 - Put a rubber-banded stack in your suitcase, so you don't forget them when you're traveling.
 - Watch the brief video about business cards at <u>t.ly/dZmW6</u>.
- □ Women's outfits may not have pockets.
 - Plan for networking events by wearing a blazer with pockets.
 - o Keep one hanging on your door at work for lastminute programs.
 - Ensure you have a purse with a shoulder strap and keep your cards in an outside pocket, so you can effortlessly pull them out with one hand.
 - In a pinch, you can insert a few cards in the back of your plastic name tag or cell phone case.
- At networking events, to avoid embarrassing mix-ups, always keep your cards in your *left*-side pants or jacket pockets, and the cards you collect on your *right* side.
Second-Year Accountants

Mindset:

Build your internal brand and develop a network.

Your number one priority as a second-year accountant remains to learn to be a *skilled accountant*; marketing is still a distant second. Continue to focus on building your internal brand for excellence, efficiency, client service, and teamwork. Stay in touch with your friends and contacts.

- Continue the "First-Year Accountant" activities, above.
- Continue adding new names to your mailing list and your LinkedIn and Facebook networks as you encounter these contacts.
 - Society of CPAs committee members
 - Association, industry, or trade organization members
 - Your peers within client companies
 - People you meet at networking functions
 - Alumni association contacts
 - Identify a nonprofit organization you are passionate about and get actively involved. Start volunteering now to learn about the organization, with the goal of securing a board seat in the future. Look for a solid board roster to associate yourself with.
 - Consider joining an organization like Toastmasters or Rotary to enhance your networking and presentation skills.
 - Read a good networking book, like the popular *Never Eat Alone* by Keith Ferrazzi, at <u>t.ly/ME5a</u>.
- □ Join LinkedIn groups of the associations and industries you are interested or involved in.
 - Pay attention to the conversations.
 - Identify the industry leaders.
 - Participate actively and helpfully. Showcase your interest and expertise by providing valuable and insightful information
 - o Remember, listening and engaging with what others post is as important in social networking as what *you* say and post.

- Read AICPA and accounting-profession trade magazines and accounting-specific blogs and online news sources like *Journal of Accountancy, Accounting Today, CPA Practice Advisor,* or *Accounting Web* to improve your technical skills.
- Volunteer for firm committees and activities. It's a great way to raise your profile and get to know people in other areas of the firm.
 - "Offer to help with firm activities, e.g., rebuilding together, participating in food bank drives, etc. Be an active member of the firm 'family." —Dave Bruns
 - Help with practice group activities such as technical committees, client webinars, or content development.
 - Help firm compile client presentations and proposals to gain an understanding of the process.

Third-Year Accountants

Mindset:

Continue developing your external network, including relationships with your in-house contemporaries.

Start developing a toolkit of the soft skills that will become increasingly important to your success, e.g., an elevator speech, public speaking, writing or co-authoring articles or blog posts, and interpersonal communication skills to inspire confidence. By now, you're getting a better handle on your practice. Continue improving your technical skills, but you can begin to be more proactive in growing your network.

- Continue the First- and Second-Year Accountant activities, above. If you are getting started now in your marketing, undertake as many of those activities as possible this year. Build your platform.
- Enhance your resume by participating more actively in professional, industry, or trade associations within your practice area.
 - Volunteer for a committee and work toward a leadership position.
 - Write a brief article or blog post on an area of interest for a committee newsletter. Link to it and circulate it on all of your social media platforms (LinkedIn, Twitter, etc.).
 - Give a speech on an area of particular interest.
- Increase marketing efforts; devote time each week to a proactive networking activity, e.g., lunch, breakfast, dinner, symphony, sports, professional events, etc.
 - Create a written plan to regularly connect with your list of top prospects and referral sources.
 - Come prepared to ask well-informed questions about their business and current struggles.
 - Don't forget to leverage your firm's competitiveintelligence and knowledge-management tools.
 - Listen for opportunities to help them achieve their goals.
 - Find ways to help them become successful in their careers
 - Nancy Myrland, President of Myrland Marketing, suggests asking questions like:
 - o How are things going at your company?
 - o What kind of issues are you dealing with right now?
 - o What are the most pressing issues that you have to solve?
 - o What has surprised you the most?

- o How is that going?
- o Is there anything at all I can do to help?
- Master an essential "elevator speech" (plenty of useful how-to information is available online).
 - A good elevator speech focuses on how you help companies like theirs achieve their goals; it's not merely a generic description of your practice.
 - If you ask them what they do *first*, you can tailor your response more particularly.
- Tell people what you do in a memorable, personal way.
 - Avoid using jargon.
 - Talk about the *benefits* of what you do, not the features. That is, not a list of the services you offer, but how what you do helps your clients do their business better.
 - Keep it so simple that an eight-year-old could understand it.
 - Watch the video at <u>t.ly/pZxGk</u>.
- Dave Bruns reminds us that "the goal is to get them interested in speaking with you, not shut down the conversation. You want them intrigued enough to ask follow-up questions, while you quickly transition the conversation back to them. It's simply a door opener make it interesting, humorous, or personal, not technical or difficult to understand."
- □ Write multiple versions of your elevator pitch.
 - Quick version: One or two sentences that describe what you do and why.
 - **Medium version:** One to two paragraphs; an expansion of your quick version of the what and the why to include the who.
 - Long version: An expansion of your medium version; can include example clients, representative engagements, and other relevant information.

- Alternative versions: Create customized versions of your elevator pitch for different audiences.
- Most importantly, a "canned" pitch isn't likely to be helpful. The goal is to ask the other person about themselves *first*. This way, when they then ask what *you* do, you will have the information that helps you describe yourself and your practice in an advantageous manner, showing them that you are knowledgeable about their business and industry.
 - o Why waste time talking about things you do that they don't care about?
- In addition to your elevator pitch, have short answers ready to simple questions such as "How are you?" Instead of saying "busy" or "swamped," have an anecdote prepared about a new matter you are working on or an interesting industry-specific webinar you attended. Always remain upbeat, especially in these turbulent times.
 - "Be a real person having a real conversation, even if it means admitting that you don't have all the answers but are working hard to find them." —Lisa Vicine
 - "Consume lots of data to remain relevant. Read or scan People magazine when you're at the grocery store, so you are never left out of a pop-culture conversation." —Dave Bruns
 - See the video on this topic at <u>t.ly/pZxGk</u>.
- Learn to turn social contacts into potential business contacts.
 - This tactic is a *long-term* process; it takes typically at least 7 to 20 touchpoints with a new contact before you begin to have a chance to get hired.
 - "Active listening" is paramount.
 - o That is, focus intensely on the speaker, work to thoroughly understand their message, and respond thoughtfully.
 - Ask well-informed questions regarding their business.

- o Listen for opportunities and ways to help them achieve their goals.
- o Find ways to help them become successful in their careers.
- Ask your firm for training on networking skills. See the video at <u>t.ly/iLLA</u>.
 - Networking is a learned skill. It's not difficult, but many behaviors are counter-intuitive to most accountants and professionals.
 - Most importantly, remember that work is brought in by listening, not talking.
- Look for opportunities to develop new business from existing clients.
 - When chatting with your peers inside client companies, listen for new areas where they might need additional help.
 - o They might need state and local tax help or a review of their internal payment controls.
 - Did they mention that they were considering buying a new building, expanding into a new state, developing a new product or service?
 - o Do they have a succession plan? Should they start discussing retirement planning or gifting anything to their children?
 - Mention these issues to the partner-in-charge of the client relationship.
- Read targeted print and online industry publications
 - Subscribe to blogs and follow the LinkedIn and Twitter accounts of leaders in these industries.
- Add select client and prospect names to your Google Alerts (e.g., "John Smith's Rolls Royce Dealership").
 - Use the information you receive as a reason to contact, congratulate, or reconnect.

- Learn the extent of your firm's marketing and business development resources.
- Get to know your firm's marketing and business development professionals.
 - They can be an excellent resource for you.
 - They often have valuable marketing opportunities to share. If they see that you respect them as professionals and value their advice and contributions, they're more likely to offer you the strategic perks that come across their desks.
- Attend marketing and business development training provided by your firm.
 - If the firm doesn't provide it, request it.
 - The leading firms are spending more time and effort on business development/sales activities.
 See the video at <u>t.ly/j9jT</u>.
- **□** Reach out to new team members who join your firm.
 - Introduce yourself.
 - Develop internal relationships and become a helpful resource.
- Update your LinkedIn profile.
 - Add organizations, volunteering experience, and honors and awards.
 - Add your top thought leadership pieces to the Publications section and include a summary and the article URL.

Fourth- and Fifth-Year Accountants

Mindset:

Continue refining your skills.

Expand your network and build your external reputation and resume.

Focus on client-service skills and interacting with clients.

Big-firm accountants may transition to Senior Manager status.

Remember that providing the highest-quality technical skills and extremely responsive client service are essential elements of your firm's marketing to its existing clients.

As a fifth-year, you should be active or chair a committee in a state or local Society of CPAs, or industry or trade association committee as a persuasive resume builder. You may also seek to create a new committee to leapfrog the competition.

A Plea to Focus Your Marketing

During this time, start focusing your efforts more narrowly, particularly toward a service and/or industry group or sub-specialty practice niche. See the videos at <u>t.ly/gUUA</u> and <u>t.ly/7kc4</u>.

Here's the larger point: When the next recession hits, you don't want to be just another smart and skilled but generic and easily replaced generalist. Seek to be the one who offers *more*. Offer a skill or expertise that your firm can't find in similar measure in every other professional in your graduating class.

It becomes easier for others to cross-sell your skills if you have unique expertise that the partners can remember when in conversations with prospects.

"You manufacture bicycles? [Or build prisons, or manage multiple casinos, or...?] One of our associates has particular expertise in that area!"

For example, I probably know more about industrial tire manufacturing than just about any lawyer in the world— it's my family business. My father and grandfather designed and built tires for heavy equipment, like underground mining drills, crawlers, loaders, etc.

Growing up, the specs of new tire sizes and the composition of tire fill was typical dinner conversation. As a child, I played with toy Caterpillar forklifts and vulcanized rubber for my fifth-grade science fair project. I worked in the factory in high school, I've flown on the Goodyear blimp. My sisters know this stuff too.

I take for granted an insider's nuanced understanding of this narrow little (multi-billion-dollar) industry, full of companies like Goodyear, Goodrich, John Deere, the rubber importers, chemical manufacturers, and coal and other mining companies. *And all of those companies have law and accounting firms that provide them with regular advice.* I'm confident that I knew more about this industry than just about any lawyer in the country. Unfortunately, it never occurred to me when I was practicing, that these types of companies would have found my unique knowledge to be valuable. I offered nuanced industry insight even the most experienced partners couldn't possibly possess. I would have been a tremendous asset to the partners on new-business trips. If I'd thought to mention it, I could have stood out in a very positive and client-oriented way.

This anecdote illustrates what I mentioned earlier about the partner who mastered the art of accounting for car dealerships — an insider's nuanced understanding of a narrow little industry. Practicing as an accountant, think of those areas where you have an uncommonly high level of insight.

Chances are there is a group of clients who will find that unique knowledge valuable. Instead of marketing "audit" to generic local businesses, you can market specialized expertise to companies. They will see your inside knowledge as a differentiator and value your passion for their business and industry.

For the prevalent industry sectors, it may not be enough to just specialize in real estate, construction, health care, manufacturing, or nonprofits— they may be too broad. You should strive to be more precise and find a niche within them (e.g., R&D tax credits in manufacturing, 1031 exchanges in real estate). You will also find opportunities in smaller, more defined, and obscure areas where you have the existing experience, interest, or contacts.

Think in terms of focusing on "pest control" rather than "small businesses." Not just "transportation companies" but those that specialize in infectious biological material. See the video at <u>t.ly/Ou1g</u>.

Consider segmenting it further by geography and/or the particular type or size of the company. The right answer for you might not be apparent now; just look for it and recognize it when it comes along. It takes at least a few years to build this specialty, so be proactive in this regard, beginning around your fourth year. Almost any kind of industry expertise can be helpful. My friend Steve Borkan has a specialty in defending the police and local municipalities in taser-related cases. Watch him get Tased during an official police training class, at <u>t.ly/FVCe</u>. Another friend, Dean Gerber, specializes not in general corporate finance like innumerable skilled competitors, but specifically in *aviation* finance, i.e., financing airplanes and helicopters.

At Fishman Marketing, we have developed marketing initiatives supporting firms that targeted niche industries or practices, including these:

- Ad valorem property tax cases in Chicago
- Alabama pest-control companies
- Backyard-barbecue propane-tank explosions in Colorado
- Bridge-and-tunnel construction companies in Florida
- Global aircraft and railcar finance under U.S. law
- Multi-generational family businesses
- New York companies doing business in Israel
- Northern California agriculture industry
- Oil and gas companies in Louisiana
- Upstate New York forestry and timber regulatory

Accounting firms have a similar opportunity to further brand themselves through innovative marketing campaigns that build on their specialized expertise.

Considerations in identifying the specialty niche or industry to target include:

- Did you grow up in a family business?
- What was your college major?
- What hobby, passion, or particular skill or interest of yours would clients value?
- What job did you have in college?
- Can you get any clues by analyzing what's hanging on

your walls or sitting on your credenza?

- Where do you or your spouse have an established network?
- What do you know that competing professionals don't that would benefit some category of clients?
- Think through your list of friends and family members. Are several of them in one particular industry or niche?

Take some time to review and fill out the "Target Marketing Worksheet" form below. It is a good start toward helping you identify the particular specialized niche around which you can build a persuasive personal brand.

Visit a library to review a print copy of Gale Publishing's multi-volume *Encyclopedia of Associations* to help you identify your narrow niche. See <u>t.ly/Ejgh</u>.

- Visit your local public library and browse through the easyto-use 125,000-association directory to identify the best trade groups or professional associations serving your target industry. It is also available with a Lexis/Nexis subscription.
 - Seek a 500 to 1,000-member national association with an active local chapter.
- Email them to learn more about their members and request membership information.
 - If the membership includes accounting-hiring decision makers, consider joining the group.
 - Don't worry if the members are junior or mid-level professionals; build relationships with them when you're both starting your careers. They'll be in a place to hire accountants when you're in a position to get hired.
- Validate the choice of that group with your contacts who might know it.
- Once you have selected the organization or association,

your ultimate goal is to become one of the "usual suspects" in that group— a highly visible, friendly, helpful, active contributor. Spend a couple of years just learning about the industry and the association members.

- Attend at least 8 out of 12 monthly local chapter meetings per year.
- □ Network regularly and actively; get to know everyone.
- □ Keep the conversations focused on *them*.
 - Remember the 80/20 Rule of Communication: You should spend 20% of the time talking, mostly asking interested, insightful questions about them and their businesses, and 80% of the time listening.
 - Remarkably, studies show that the more *they* talk,(1) the smarter they think *you* are, and (2) the more they like you!
 - Be actively interested in them.
- Be helpful; offer advice and assistance.
- Join a committee and follow through on any assignments or responsibilities.
 - People will judge your skills based upon how you perform as a volunteer. Do you meet your deadlines and commitments?
- Do not seek work or sell your firm, or you will be shunned as an <ugh> "vendor."
- Try to understand "why they buy," not "how to sell to them."









We don't need to show you another picture of a plane. But Vedder Price knows the big picture in aircraft finance. We do sophisticated deals for every type of major asset across the U.S. and around the world in transportation industries including aircraft, maritime and rail. Multi-billion-dollar deals for every type of entity from airline lenders to lessors have cemented our reputation as one of the world's foremost transportation-finance practices. Learn more at vedderprice.com. Vedder Price. Vedder Equipped.

Chicago | New York | Washington, D.C. vedderprice.com







More Activities for Fourth- and Fifth-Year Accountants

- □ Identify a **client-development mentor**, ideally a young rainmaker who's invested in your future and can help answer questions and provide guidance and support.
- Learn about your clients' and prospects' companies and industries.
 - Regularly read industry websites, publications, and blogs.
 - Conduct online research periodically to stay current on their issues and needs.
- Browse company websites frequently, especially sections like "About Us," "What's New," and "Press Releases."
 - Follow them on social media.
 - Create a Google Alert for each company and each influential decision maker.
- Create and maintain an ongoing list of your jobs, with one paragraph summaries, including:
 - What was the purpose of the engagement?
 - What work was performed?
 - What issues did you solve for the client?
 - What was significant about the solutions that were employed?
 - What challenges did you come across on that particular job, and how did you address them?
- Notify your firm's Marketing Department of significant engagements you are involved in or aware of, for public relations purposes.
 - Basically, if you ever find yourself saying, "Really??? *That's* interesting!" about some non-confidential information, your next thought should be, "I'm going to tell Marketing about this! Perhaps we can use it to generate some publicity or attract some positive attention for the firm."

- If you enjoy Twitter, tweet at least weekly on issues relevant to your narrow area(s) of interest.
- Write an article for an accounting, trade or industry publication, or blog on new obstacles, trends, or precedents relevant to your area(s) of interest.
 - Search through your non-confidential emails or client memos looking for any lengthy explanations regarding a particular topic. Seek to edit and repurpose that content into a more polished piece for publishing.
 - Invite a client to co-author it with you (as a nice valueadd).
 - o Most likely, you'll do 90% of the work.
 - o It's particularly useful if it includes your photo(s) to enhance your networking and brand.
 - o Frame a reprint and give it to your client over a follow-up lunch. It'll hang on their office wall, with your face on it.
 - Another option is to use the article as an opportunity to get a meeting with a valuable prospect.
 - "I'm writing an article on XYZ, and I need to quote an expert on this topic. Could I interview you for the article next week over lunch?"
 - This tactic is a great way to meet key executives.
 - This outreach is just the first contact. Remember, it will likely take at least 7-20 more before they would be potentially willing to send you some business. It's a marathon, not a sprint.

Presentations and Webinars

- Give a presentation to an accounting, trade, industry, or community association, or client seminar. Carefully select the topic, using it to support your chosen niche or specialty practice.
- ☐ Your goal shouldn't be to simply give a nice, educational speech it's to give a presentation that the audience will remember *next week*.
 - Raise the bar and strive to deliver the best darn speech at the *entire conference* the one that every attendee will be talking about.
 - If you enjoy speaking, seek to build a reputation as a strong presenter; there aren't many accountants who can be both substantive *and* entertaining.
- Dynamic presenters build their reputation quickly.
 - Even if yours isn't the *best* speech, the attempt will improve its quality significantly.
 - You're likely to get invited back next year, and word will spread around the industry.
- Public speaking is a learned skill. Consider hiring a professional presentation consultant to improve your skills.
 - Rehearse, rehearse, rehearse.
 - Ensure you are video recorded and review it afterward. It can be mortifying to watch yourself, but it's the best way to improve your technique.
- Invite a client to co-present with you as a nice value-add.
 Plan to do 90% of the work. For these purposes, the audience is not as critical as the topic.
 - The goal is to use this speech as the foundation of a wide range of marketing material you will reuse, repurpose, and republish, spreading it across the Internet. See the video at t.ly/Z1Ej.
 - With a smartphone, portable tripod, and spring-clip smartphone holder, record your presentation.

- Upload the entire speech to Vimeo.com.
- Trim the presentation into as many 2- to 3-minute snippets as possible, and upload each of them to YouTube as individual videos, once every couple weeks.
- Use narrow, detailed keywords and buzzwords in the captions, tags, and descriptions so Google will index them thoroughly.
- **Record and transcribe the speech** or use voiceto-text software, like Dragon Dictation, Siri, or Google Docs.
 - Repurpose this single transcribed speech into dozens of different-length articles and blog posts for various audiences.
 - o Edit the transcription into dozens of tweets and social media updates.
 - o The 10,000-word text from a single hour-long speech can be cut and edited into an entire *year's* worth of valuable content.
 - Professional editors can do much of this work for you. Talk to your Marketing Department to see if you have a budget to cover the cost.
 "Here's the transcription of my speech. Please edit this into one 5,000-word article, three 1,250-word articles, ten blog posts, five 500-word articles, and 100 tweets."

SlideShare

- Upload your PowerPoint slides to <u>slideshare.net</u>.
 - Create a complete, detailed SlideShare profile.
 - o Google highly ranks SlideShare profiles in name searches.
 - Connect the SlideShare slides to your LinkedIn profile.
- Post links and updates of your videos and slides to Twitter, LinkedIn, Facebook, and other social media accounts.
- □ If you're committed to speaking, hire a video editor to turn your speeches into a demo video mine is at <u>t.ly/Dj5Y</u>.
- Collaborate with your firm's Marketing Department professionals.
- Learn how to produce and leverage client information and Competitive Intelligence.
 - There's an abundance of valuable information available.
 - Smart firms understand how to harness the power of critical information to create demand for differentiation.
- Continue adding to your Facebook network with friends and close professional contacts.
- Continue to engage in at least one face-to-face marketing effort per week, such as breakfast, lunch, dinner, drinks, sports, social event, seminar, conference, or association meeting.
- Volunteer to assist team members or business development professionals with compiling client proposals and presentations, to gain an understanding of the process.
- Offer to host a meeting at the firm for a group in which you're active.
- □ When possible, engage in at least one face-to-face marketing effort per week, such as breakfast, lunch, dinner, drinks, sports, social event, seminar, conference, or association

meeting. For now, try to reach out to a few people online every day. Something as simple as:

Your name popped up on LinkedIn. How's it going? Every day I try to look for a few people I haven't spoken with in a while, just to say "Hello" and see if there's any way I can help enhance their success.

I know business is challenging right now; is there something I can do to help you? If so, please do not hesitate to ask; it would be my pleasure to help you work through these tough times. Warmest regards, Ross

- Volunteer to help organize or host your business school's fifth-year reunion.
 - It's a great way to stay visible with hundreds of referral sources nationwide.
 - Repeat for subsequent reunions.
 - Arrange a regular series of Zoom calls to connect with your classmates. Becoming the center of the social connections will permanently maintain your friendly visibility with hundreds of potential referral sources.
- Create a Facebook and LinkedIn group for your business school class if one does not already exist. If there is one, join it and be active.
 - Visibly moderate it, seeking fun photos, discussing memories, etc.
 - Build your name recognition

Sixth-, Seventh-, and Eighth-Year Accountants

Mindset:

Start demonstrating that you're ready for management.

Stay in touch with and provide value to clients.

Share successes with contacts.

Enhance external profile and increase visibility.

Work with a practice or industry group leader, a mentor, or your Marketing Department to set annual business development goals. Continue the activities listed above, supplemented with additional activities.

If you haven't previously done much marketing, it's not too late, just start at the first chapter of this book and accelerate the schedule. You may have a lot to accomplish, but it's not impossible if you stay focused and diligent.

- Meet with contacts at other professional services firms (i.e., legal, financial services, real estate, management consulting, public relations, and practice-area boutiques) to identify strategic partnership opportunities such as co-hosted events, client teams, and referrals.
 - Follow-up to events and meetings is critical.
- Work toward a leadership position in your selected trade or industry association.
- Use technology to help grow and stay in touch with your network, e.g., blogs, Twitter, LinkedIn, etc.
 - Keep your platform narrow and *focused*. The world doesn't need another general "Audit" or "Tax" blog or Twitter feed. If you're going to blog in these areas, you'll need to identify a niche or theme (i.e., a series of articles on the new FASB reporting rules).
- Consider running half-page ads in the industry publication, if
 - You would be the only accounting firm advertising there, and
 - You can make the ads *visually interesting* enough to stand out. See <u>t.ly/pZJGk</u>.
- Request professional LinkedIn Recommendations, as appropriate.
 - Write Recommendations for clients and prospects. These personalized notes are more significant and

meaningful than simple one-click Endorsements.

- Engage in at least *two* face-to-face marketing efforts per week.
- Ask your partners and business development professionals to allow you to join them on pitches and client-assessment visits when appropriate.
- If you enjoy Twitter, follow the journalists who cover your service line or industry.
 - Engage with them occasionally.
 - o Build relationships with journalists who may ask you to act as a resource for articles.
 - o Offer to provide expert commentary on professional developments.
 - Others who follow those journalists may follow you too.
 - o Twitter is a geometric, not a linear platform.
- Go to Amazon.com and buy a general handbook that teaches both print and online **Public Relations** strategy.
 - Learning basic PR skills isn't especially difficult.
 - Accountants who understand how to use the media to their advantage can expedite their marketing success.
 - Two brief PR videos:
 - A 3-minute clip, discussing what PR is and how it differs from other types of marketing at <u>t.ly/eZPyn</u>.
 - o A 10-minute clip, explaining what makes something newsworthy, at <u>t.ly/1xn35</u>.
- Talk to your marketing professionals regarding the analytics from your client alerts and blog posts and how you can use the information for business development purposes.

Visiting Clients
Visit clients on-site at their offices, factories, facilities, or stores, at no charge.

- Many rainmakers consider client visits to be the single most important, most effective marketing tool available.
- Dress appropriately for the location (suit, business casual, or jeans and work boots).
- Tour the plant, meet employees.
- Prepare for this visit. Research the client before you go, understand what your firm is doing for them holistically, as well as what other firms they might be using for things like R&D tax credit study, 401(k) audit, or personal tax returns. Ask insightful, educated, well-researched questions.
- Become more familiar with their industry's tax, business, and finance issues.
- This is critical: You are there to enhance your relationship and learn how to represent them better; DO NOT SELL.

Networking and Attending Seminars

- Networking is a *long-term* process. Learn to meet more of the *right* people, those you can turn into prospects, business contacts, and clients.
 - "Active listening" is vital.
 - Ask well-informed questions regarding their business.
 - Listen for opportunities and ways to help them achieve their goals.
 - Ask your firm to bring in training on networking skills. See the video at <u>t.ly/iLLA</u>.
 - Networking is a learned skill. It's not difficult, but many behaviors seem counterintuitive.
 - Most importantly, remember that the best information is gleaned by listening, not talking.

Before the Event

- Determine whether the event you'll be attending is for business or social purposes.
 - o If it's *social*, great, have fun. But if it's for *business*, then you'll need to be more intentional and strategic, and invariably have less fun.
- When blocking off the event on your calendar, include an additional hour to the scheduled time.
 - Commit to arriving 30 minutes before the program starts and staying 30 minutes later — *that's* when the actual networking occurs, not during the presentation.
- This extra networking time is essential if your goal is to create new relationships or reinforce existing ones. Consider doing some quick Internet research regarding any targets or prospects you expect to be at the event.
 - o This information gives you an easy conversation starter.

-Hey, I read that you were [doing X]. Tell me about that!"

o It also positions you as the type of informed, educated professional they should want to engage.

- Write down a few simple, tangible goals to complete. They can be simple, e.g., "Meet two new people," or "Collect three business cards," or "Speak with Amanda Jones, CFO at XYZ Company."
 - o Identifying specific goals makes your behavior more strategic and intentional; it'll guide your movements and let you know if you've been successful.
 - o One goal should be to speak with an existing contact you know will be there.

- Ask two questions: "How's business?" and "What are you working on that you find especially interesting?"

• Helpful hint: Carry small "thank you" cards in your bag for quick, efficient follow-up.

During the Event

- **Be strategic regarding your conversations.** You're busy, and you have taken valuable billable time away from work to be here.
- You have only 30 minutes to meet and chat with the people you need to help advance your career. You can't afford to risk spending this time with the "wrong" people.
- Subtly read their name tag and assess whether they fit your strategic profile *before* approaching and engaging them in conversation. (Don't get caught doing this.)
 - o This might feel a tad mercenary, but remember, you've decided that this is *business*. You're at this event to meet new people who might turn into prospects and clients, not to make friends. That's for some other time or event.
- Don't sit at empty tables. The same rule applies to where you sit — be deliberate regarding whom you'll spend your lunch with.
 - o Choose your seatmates carefully, intentionally, and subtly.

- o You'll spend a significant amount of time between these two people. Make sure they're the "right" people for this occasion.
- Try to meet more, rather than fewer people.

Wear a name tag

- If you need to write your own, make it neat, large, and legible. It helps attendees ask you questions and remember you later.
- Affix name tags to your *right* lapel, not your left. This way, it faces towards people when shaking hands with them.
 - Women may need to plan a bit regarding their fashion choices to avoid damaging fragile clothing with a name tag's sticker or alligator clip.
 - o Have a selection of indestructible "conference blazers."
 - o Keep one hanging on your door at work for lastminute programs.
- If you're given a lanyard, position it above your chest so people can comfortably see it.
 - o It may have a spring-clip to resize it. Tie a knot if necessary.
 - o A name tag dangling around your stomach is entirely invisible.
- When you next receive a magnetic name tag, consider keeping it in your briefcase. They're the most flexible and least destructive style and can be reused at future events.
- Networking Questions. It can be difficult to get started in conversation with a stranger. Try some of these.
 - [Look at their name tag.] Tell me about [company].
 - What do you do there?
 - What kinds of products/services do you provide?
 - Who are your target customers?
 - How did you get started in _____?

- What do you enjoy most about what you do [or the topic of the event]?
- What are some of the projects you are currently tackling?
- What can I do to help you/your business?
- Graceful Exit. Once you've made a good impression with someone within your target audience, create a relevant follow-up meeting or activity, commit to that follow-up, then exit the conversation so you both can continue networking.
 - It's socially acceptable to suggest that you need to make a call, use the restroom, say hello to someone you see across the room, or get a drink.
 - *o* The Half-Glass Trick. A friend of mine always orders a half-glass of beer at the bar. This way, he's never more than a few ounces away from an excuse to get out of an unhelpful conversation.
 - "I don't want to take up all your time. "I'd like to continue our discussion, so how about we plan to get together?
 "I'll email you in the next couple of days."
 - o Then be sure that you *do* it.
 - o Write your promise on the back of their business card after you split up, so you'll remember.
 - Don't get caught doing this; some people and cultures feel that writing on their business card is insulting.
 - o Follow-up is hard. But it works.
 - Don't monopolize their networking; they want to speak with more people too.
 - o You must *force* yourself to keep moving. It's so easy to continue a lively conversation when things are going well.
 - Fight the urge to speak only to your friends.
 Hanging out with them is easy and fun, but that's not why you're at this event.

□ After the Event

- Connect with them on LinkedIn within 24 hours, with a brief personal note that reminds them who you are and where you met.
- Use the information on the business cards to add them to your firm's contact list or database for appropriate mailings, holiday cards, etc.
 - Try to send a follow-up email by the next afternoon.
 Keep it simple and to the point, such as, "Nice meeting you, let's continue our conversation over lunch."
 - -Offer a specific date, time, and place in your email. Don't waste time with endless noncommit tal back-and-forth communications.
 - -Be polite and assertive; they will appreciate your being direct.
- Follow up as promised. For example, you might say, "After we spoke, I looked into [the topic in question] that relates to our conversation. I have attached a couple of the firm's electronic updates on this issue. Are you signed up to receive them?"
- While it's important to provide the client with as much meaningful information as possible, it's also essential to find out as much as possible about their business and role.
- Clients particularly value accountants who understand their business and industry. Speaking the client's language can set you apart in a positive way.
- Think about a strategy for the specific kinds of business initiatives and accounting work you would like to partner on with clients.

Conduct a "Needs Assessment."

The basis for conducting this assessment is to identify a client's needs and objectives. It will also allow you and the client to work together to brainstorm and create a clear plan for the future.

The key is to strategize and present this information in a way that identifies their questions and concerns and helps them achieve their future goals. If there are business solutions to their issues, you have a path to find a way to work together on them.

Susan Freeman, CEO of Freeman Means Business, offers "some powerful questions that show respect for the client, allowing them to share what's most important to them, below:

- From your perspective, what would be a valuable way for us to spend this time together?
- What would be useful for you to know about our firm?
- What prompted your interest in our meeting?
- In talking to some of our clients in your industry, I'm struck by a couple of particular issues they are grappling with. These include: [give examples]. How would these resonate with you and your management?
- How is your organization reacting to... [a recent, important development in this client's industry or function]?
- How are you handling... [new competition, cheap imports, a new regulatory framework]?
- Is there a particular competitor you admire?
- Can you tell me what your biggest priorities are for this year?
- What are your most significant opportunities for growth over the next several years?
- What exactly do you mean when you say ["risk-averse," "dysfunctional," "challenging?"]
- Who would you say are your most valuable customers?
- What would your best customers say are the main reasons they do business with you?

- Why do customers stay with you?
- Why do customers leave?
- When customers complain, what do they say?
- How have your customers' expectations changed over the past five years?
- How would you describe the biggest challenges facing your customers?
- What's the driving force behind this particular initiative? What is behind the drive to reduce costs, design a new organization, etc.?
- What would "better" [risk management, organizational effectiveness, etc.] look like?
- How much internal agreement is there about the problem and the possible solutions?
- From your perspective, given everything we've discussed, what would be a helpful follow-up to this meeting?"

Any one of these can help you to show respect, gain trust, build rapport, and, ultimately, be likable. Since people want to work with people they like, remember to try active listening rather than talking.

Your Mental Health

Accounting can be a stressful and challenging career. We work long hours on intellectually challenging projects for clients who may seem demanding and unappreciative. We often bring the work home with us not just physically, but also mentally and emotionally.

It is essential to take care of yourself. Eat right, get enough sleep and exercise, and spend time with your friends, family, and hobbies. Volunteer for a charity. Ensure you have a vibrant and fulfilling life outside of your practice, as well. Being successful and productive is more about that balance than about the quantity of work you have produced.

Accounting can be an isolating profession, even while working in an energetic office. In today's uncertain times, it is essential to focus on your emotional and mental well-being, in addition to your physical condition.

Take the time to exercise and find productive ways to distract yourself. Try to maintain a consistent daily routine. Take a walk or ride a bike.

Sarah Tetlow, Founder of Firm Focus, suggests "when distracting projects pop into your mind or vision while you're trying to finish a deadline for work, quiet the distraction by identifying *when* you will address it.

- 'I need to input my time, update my WIP, or bill a client I will do that when I take a break at 3:00.'
- 'I should write an article about this topic!' I will set a tickler reminder to prepare the draft on Tuesday after I've finished this plan.
- 'I need to stop at the store for this after work.'

By identifying a scheduled time for your next action on those precious thoughts and tasks, knowing that you have a plan will help calm your brain of the distraction."

Speaking of calming the brain, practice mindfulness with an app

like *Calm* or *Headspace*. Listen to some stress-reducing music, like "Weightless," by Marconi Union at <u>t.ly/vbcA</u>. Perhaps seek to get in better shape by downloading an exercise app like *Couch* to 5K, Hundred Pushups, or Pocket Yoga (available at the Apple store) and get started!

Andrew Fishman says, "It's important to stay informed, but it's easy to become overwhelmed by too much bad news. "Resist the powerful attraction to the social media platforms that can increase your stress. Sites like Facebook often act as a funnel for bad news, fake news, conspiracy theories, and people either complaining about their miserable lives or humble-bragging about how much better their lives are than yours.

"Try to be proactive about connecting with loved ones. That is, FaceTime is better than calling because you can see the smiles on their faces. Calling is better than texting because it's more interactive, and you can hear them laugh. And texting is more dynamic than passive email well-wishes. Share upbeat messages on Instagram."

Consider reading *The Happiness Advantage* by Shawn Anchor (at <u>t.ly/5yXU</u>), which discusses how "happiness fuels success." In your life and career, strive for a career that provides *both*.

If you feel that you may need some support or assistance, there are many available resources. These include (1) Assistance Programs through state and local CPA associations, and (2) the renowned Hazelden Betty Ford Foundation at hazeldenbettyford.org. Seek them out.

General Mindset

Always remember, whatever your job, always do more than is expected. Get to work a bit earlier, stay a little later. Pay attention to how the senior partners dress. Ensure that your shoes are shined and your clothing is neat and clean. Show that you care, that you take this profession seriously and are dedicated to doing your best for the firm and its clients.

Clients can't often determine whether you're doing a good technical job, but they can tell how well you're treating them. Communicate regularly. Meet your obligations and deadlines. Be responsive — don't make clients wait to hear from you; try to return every call or email that day.

Treat every person at the firm with the utmost respect regardless of their age or title. Learn the names of all of the receptionists, administrative assistants, interns, and janitors. It's not only the decent thing to do, but people notice. It matters.

In Conclusion

If you follow this checklist, over time, you should find that you have developed a significant network of the right contacts, which you can turn into clients. Moreover, you will have laid the foundation for a successful career, one that is fulfilling personally, professionally, and financially.

Remember, once you identify what you love to do, find a way to bring that into your practice. If you do, you may spend your time until retirement, leaping out of bed every morning, passionate about your profession, your career, and your success.

Ross Fishman, JD

Ross Fishman is one of accounting marketing's most-popular marketing and business development keynote speakers and trainers. Often characterized as both highly entertaining and educational, Ross's presentations draw on his experience as a lawyer, marketing director, and marketing partner, inspiring professionals at all levels.

A Fellow of the College of Law Practice Management and a Kentucky Colonel, Ross has branded 200 law and accounting firms worldwide and has written 300 bylined articles and seven books. He was the first marketer inducted into the international Legal Marketing Association's Hall of Fame and developed the strategic plan for the Association of Accounting Marketing (AAM). Subscribe to his marketing blog at <u>fishmanmarketing.com/blog</u>.

Ross received a B.A. in Speech Communications, *cum laude*, from the University of Illinois and his J.D. from Emory University School of Law.

Contact:

ross@fishmanmarketing.com

Strategy and Branding: fishmanmarketing.com Keynotes and Training: rossfishman.com

LinkedIn.com/in/rossfishman Twitter: @rossfishman

Ross's Speaker Demo: <u>t.ly/Dj5Y</u> **"250 Good & Bad Brands":** <u>t.ly/eN8vn</u>

Jennifer Cantero

Jennifer brings more than 20 years of business and marketing experience to her role as Director of Marketing and Sustainability at Sensiba San Filippo LLP. She leads the firm's marketing efforts for the core accounting, tax, and consulting services as well as consults with small- to medium-size, privately held business clients, assisting with their marketing strategy and sustainability practices.

Jennifer joined SSF in 2012, where she built their social media and content marketing program from the ground up. She also led the firm's B Corporation certification process, resulting in SSF becoming the first California accounting firm certified as a B Corporation.

Jennifer received a dual Bachelor's degree in Graphic Design and Photography from California State University, East Bay. Currently, she is attending Harvard University, studying Corporate Sustainability and Innovation. Jennifer is a member of The Association for Accounting Marketing (AAM) and currently serves as a member on the board. Outside of work, Jennifer enjoys CrossFit, kayaking, and spending time in the redwoods.

> jcantero@ssfllp.com LinkedIn.com/in/jennifermcantero Twitter: @JennCantero

Appendix

Drafting a Persuasive LinkedIn Profile

This memorandum will serve as a checklist of essential items that should appear on your LinkedIn profiles.

1. List Your Full Name

Do not use abbreviations. Married women who changed their name should include their maiden name as well.

2. Display a Professional Photo

There are reasons why some people don't want to display their photos, but this is a social networking platform. Not posting your photo raises unnecessary questions. Ensure that it is a professional, high-quality photograph. LinkedIn is not Facebook; do not use cropped group, vacation, or wedding photos. No props or artistic effects. Express your personality but err on the side of being more conservative.

Below are three LinkedIn photos with different styles. Iris Jones is outside with natural lighting and casual but professional attire. Sheenika Gandhi wears a business suit in front of an interior office setting. Nikki Sokol is wearing a suit with a traditional solid-colored background. Each photograph conveys a slightly different impression. Choose your photo's style to support the image you are trying to create.







3. Have a Professional Headline That Properly Brands You

In the space underneath your name is your "Professional" or Profile Headline. It will appear in search results next to your name, as well as next to any questions you ask or answer. It is, in essence, your elevator pitch in a few words. Do not merely put your title and firm name here: this is the place to interest anyone who finds you in a LinkedIn search result to learn more about you.

Think more in terms of "Raleigh Manufacturing Tax Accountant" or "North Carolina Manufacturing Accounting Practice," rather than "Manager, Smith & Jones LLC."

4. Have Something Relevant and Timely in Your Status Update The Status Update is about showing that you are still relevant in doing whatever you are doing. Going to an event? Share it. Attending a conference? Share it. Read something interesting that is relevant to your brand? Share it. Use your Status Update to show your relevance and try to aim for a once-a-week update. You don't want someone visiting your profile and see a Status Update that is months old.

For those who enjoy writing, LinkedIn is an ideal platform to push out your articles.

5. Display Enough Work Experience... with Details

Your LinkedIn profile doesn't need to be a resume. A straightforward sentence summarizing what you did is enough to ensure that a potential reader understands the role that you had. Job descriptions provide you the perfect opportunity to pepper your profile with narrow, search-engine-friendly keywords that will help you get found. For example:

Karen serves small to medium size, privately held food and beverage manufacturers across Northern California. She works with clients on financial and tax opportunities that are consistently under-leveraged, such as hiring credits, research and development credits, derivative use, and international accounting solutions.

6. Education

Put education details on your profile. What did you achieve at a particular school? Honors, awards, or activities? Mention them.

7. Get Some Recommendations

The LinkedIn "profile completeness" algorithm requires that you receive three recommendations to get to 100%. This is not critical but is useful. Do not be embarrassed to ask friends who know you well to recommend you; it's a well-understood part of social networking today. And when you've done something particularly great for a client, that's the optimal time to sheepishly tell them that "the firm's marketers insisted that we ask for some LinkedIn recommendation." That is, you may blame "Marketing" if it makes you feel less awkward to ask; your client will understand. Email them the link to make it easier for them. And of course, it's only polite to recommend them back!

8. Acquire Connections

If you're on LinkedIn, you should be networking. Connections are also essential to help get found in the vast LinkedIn database. Rule of thumb? Multiply your age by ten, and that is the *minimum* number of connections that you should have. Join some relevant practice and industry groups and connect with the members you know. Start with your firm, any previous firms you've worked for or jobs you've held, and your business school class. Connect, connect, connect.

9. Your Professional Summary is Essential

The Professional Summary section is the first thing people will read, right after your headline. Don't just dump the first 2,000 characters of your standard resume into your LinkedIn Summary. This summary is how you will introduce yourself to your professional contacts: future clients, referral sources, and employers.

LinkedIn is the most important professional social networking platform, so why not spend a few minutes introducing yourself? This digital doorstep is the place where you can tell your story in your own voice, typically with a bit more personality than your firm's website biography. And the first couple of sentences are especially important because that's what people will first see on their phones, or before they click on "See More." Start strong. Motivate readers to *want* to see more.

Devote the time necessary to make your Summary genuinely great. Admittedly it can be challenging to write this way about yourself, so get some help from a professional writer or perhaps an old friend who aced that college creative writing class.

Here's one I wrote for my friend Joe Fasi, one of the nation's top trial lawyers. Joe's a terrific, modest guy, and he wins complex ten-figure cases because juries like and trust him. It's just 333 words long, but see if perhaps you are starting to like and trust him a bit already:

Most people know the movie "The Maltese Falcon." I am not the Maltese Falcon, but I am from the island of Malta and speak fluent Maltese. I also like to talk to jurors and do so often and in cases with considerable damages at stake. I've tried over 100 jury trials to verdict, defending complex cases with enormous exposure against sympathetic plaintiffs.

I haven't counted up my precise win-loss record, but a client recently asked me, "how the heck I keep winning all these cases." I wasn't exactly sure how to respond to that, but I smiled and thanked him for what he intended as a compliment. Thinking about it later, I suspect the answer might partly be that I don't get involved in the games that many litigators like to play. I don't play puerile hide-the-ball tricks. I'm aggressive but honest and reasonable. I want a fair and just resolution and, if a plaintiff wants my client to pay a lot of money, they better prove that they're darn well entitled to every penny of it.

In post-trial research, juries have universally said that they liked me — they felt I approached the trial with decency and integrity and trusted me to help them get at the truth. This feedback is incredibly valuable because it means I become the face of the faceless corporation. I've helped level the playing field.

Fewer and fewer large cases actually go to trial. When they do, I defend them, nationwide, for companies that are among the most skilled and strategic purchasers of legal services, including manufacturers, pharmaceutical, and tobacco.

I typically handle cases as the lead trial attorney, getting hired at the outset to resolve a problematic dispute or lawsuit. Some companies use me as their "go-to attorney," parachuting me in on the courthouse steps, either to support an existing trial team or simply take over and handle the trial, especially the large or challenging cases.

Specialties: Product Liability, defense of nursing homes, and professional/medical liability.

11. Claiming Your Personal URL

When you sign up to LinkedIn, it provides you with a complex "Public URL." You can customize and simplify this when you edit your profile with a couple of simple steps. If you have a common name, make sure you claim your URL before others do! My LinkedIn URL is <u>linkedin.com/in/rossfishman/</u>. It's simple, and yours should be too. You can then include your abbreviated LinkedIn link on your email signature, business card, and everywhere else you go online.

Here are some simple instructions: t.ly/5PIGE.

12. Website.

You can add up to three website links. You will want to link to your blog, and you may wish to connect to a page of any accounting directory where you have a positive reference. You should make a title for each website link — instead of having your firm name as the title, use something like "North Carolina Personal International Tax Advisor."

13. Join Groups

You should join Groups that are relevant to your areas of interest and expertise. Get active in the discussions to help meet people in your growing professional network, build your brand as a helpful and knowledgeable member of the community, and start connecting with the members as mentioned above.

How to Write for the Internet and Enhance Your SEO

You can and should use biographies, LinkedIn pages, blog posts, and other online material to elevate your rankings on search engines like Google (called Search Engine Optimization, or SEO). We know roughly what Google's algorithms are looking for, making it possible to draft your materials in a way that uses this information to improve your results.

Although there are no guarantees and the rules continue to change, leveraging this information and staying current on the trends and updates improves your chance of being found by your target audience of buyers and referral sources.

Fundamentally, Google tries to connect each search with the specific pages on credible websites that seem to match that search best. Therefore, when drafting the pages you would like ranked highly by Google, write from the perspective of a prospect seeking that information, working backward from the specific Google searches they would conduct. Consider the exact terms they would use in the search box and use that same language in your collateral materials, online advertising, websites, LinkedIn, and other social media.

These days, sophisticated users are conducting longer, more complex searches, including narrow specialty areas or identifying particular types of tax credits, accounting standards, phrases, or guidelines. They include the name of the city, county, or state, which means you should too if you want to persuade Google that your page is highly relevant.

Here is one of the least-known, but most important pieces of information in this area: there are no "actual" Google search results — results differ on every computer.

Google knows who and where you are and tries to tailor the results to be most helpful to what you're searching for. This means that your search results may differ from someone conducting the same search down the hall or in a different city or country. It's why when you search for "Plumber" you'll see plumbers in your local geographic area and not from Paris or São Paulo.

This reality can lead to biased results and false confidence in your success. When you conduct a general "organic" search, your firm may receive a high ranking because Google knows your personal search history and your previous interest in that firm. A more objective or disinterested researcher, like a prospect searching from a different city, might not find you on Google at all.

It's not unreasonable for sophisticated purchasers of accounting services in the US to look for a skilled CPA firm in a rare industry by searching online. They might not do that for a major practice area in a major US city (e.g., "Boston accountant") where they can easily find a direct, in-person referral. But when seeking a professional in a smaller or less-well-known area, Google searches become a useful option. But a firm buried on page 3 or lower will be out of the competition. And that's a missed opportunity.

Writing a Great Website Biography

One of your most important marketing tools is a persuasive website biography. Most prospects will check out your bio before deciding whether to meet with or hire you. Website visitors are looking to identify an accountant with specific skills, experience, and match against their particular needs.

Profile

While there are several ways to organize the content on a biography page, we suggest that you present the information as follows:

A. High-level summary

In 50 to 100 words, summarize your specific skills. Refer to your position in the firm, reputation in business circles, and standing in your industry niches. This summary is also where you can reinforce the main attributes of your firm's brand messaging with a personal message.

This short paragraph can also serve as your signature abstract that you would use whenever there is a reference to you outside the website (in a program where you are speaking, an article you wrote, a video where you are featured, etc.)

You may also list your most-recent article, blog post, conference, or presentation — only one such entry is necessary here.

B. Career Highlights

In bullet-point form, list your top five highlights: this is where you are "packaging" yourself in terms that are relevant to your target clients and prospects. Where appropriate, link back to specific practice-area or industry pages on the site. In addition to your general experience, be sure to detail any particular expertise in the narrow specialties, niches, or industries you have selected as your marketing targets.

Replicating these career highlights in your LinkedIn profile is a must. This area is also where you refer to your practice area(s) and responsibilities in such practice areas.

C. Particulars

- *Education:* list all your schools to help people who know from there
- *Publications*: list articles, presentations, blogs, videos (with full title), and, if possible, an abstract of the subject dealt with in such material. Link all such content to the full version of the publication. Add a statement that you would be happy to send copies of the articles.
- Memberships
- Awards / Honors
- Social Platforms: addresses and links
- *Community involvement* with links to landing pages on the site for any association where you hold a leadership position. This area is where you have a chance to articulate your commitment to a cause.

D. Complete resume

You can offer your visitor the opportunity to review or access a comprehensive listing of your resume. In such a listing, you should provide full descriptions of relevant matters, such as special projects, speaking engagements, guest lectures, and press clippings.

Photo

Your headshot/photo should be recent and produced by a professional photographer.

Coordinates

The following basic information should also be made available:

- Name
- Office phone
- Cell phone
- Address (if multiple offices)
- vCard
- Name of assistant
- Practice area(s)
- Email
- LinkedIn Profile Link

Writing an SEO-Enhanced Practice-Area Page

- Describe the type of issues, services, questions, and tasks you deal with every day.
- Engage your target audience by writing your text from your prospect's perspective. Let's consider an Employee Benefit Plan Audit group:
 - The firm may proudly offer a "full-service EBP practice," but hot prospects rarely search for the terms "EBP audit" or "employee benefit plan audit."
 - They more commonly seek "401(k) audit or "403(b) audit" or "benefits audit." Therefore, those are the terms you should use in your practice pages as well.
- Refer to relevant tax credits, auditing standards, or compliance reporting.
- Drop in the name of your firm instead of merely referring to "we."
- Include specific geography the cities, states, regions, and countries you serve.
- Mention that "[Name of your firm] represents clients in the following counties."
 - List the counties or judicial subdivisions by name.
 Be careful. If the list is *too* long, Google may think that you're trying to inappropriately "pack" these terms and penalize you.
- List the articles that you have written.
- If you are writing for your practice group, add "Contact [name of accountant] at [phone number] or [email address] for more information regarding our [practice group] accounting practice."
- List the names of the accountants in the practice group

and link each name to their respective profiles.

- Add examples of work you may have done that validates their search, e.g., client testimonials, relevant thought leadership, videos, and association logos.
- When referring to associations, you may add the complete title or link directly to them.

Writing an Effective Industry-Group Page

Industry pages offer the opportunity to mix keywords that are difficult to impart in the text relating to your professional profile or practice area. These keywords include geographic terms (i.e., Detroit, Motor City, Michigan, Midwest), accounting jargon (such as "GAAP" or accelerated depreciation), and form numbers (571L, 1031, or 5500).

Here is an example of a strong industry page prepared by a Detroit-based client:

CONTRACT AND SUPPLY CHAIN COUNSELING PAGE

With our roots in the Motor City and decades of combined experience, our contract and supply chain-counseling team at [Firm Name] understands the risks, costs, and challenges of the automotive and manufacturing supply chains. This in-depth knowledge enables us to provide some of the world's largest manufacturing clients with practical and detailed advice regarding how to understand, mitigate, and allocate the risks associated with selling complex automotive and non-automotive components, assemblies, and systems in a relentlessly competitive environment.

We help our clients with:

- Supply chain contracts and long-term agreements
- Terms and conditions of purchase and sale
- Pricing and material economics contracting, planning, and training
- Tooling and molder's liens and asset protection
- Supply chain risk/allocation gap analyses
- Warranty and warranty share agreements
- Intellectual property and trade secret agreements regarding manufacturing assets and know-how

Our team also helps automotive manufacturing companies understand and comply with the applicable safety and regulatory rules and regulations affecting their products, including:

- National Highway Traffic Safety Administration (NHTSA) rules, compliance, and reporting
- Understanding and managing voluntary and mandatory recalls
- TREAD Act and Early-Warning Reporting planning and compliance
- Training, planning, and counseling for automotive manufacturers new to the United States

You will notice that any of the topics on this page could be live links that open to new pages that would speak to such content in greater detail — you can start developing those pages when you have time.

Finally, one last word on the makeup of this page: you can also cross-link specific items to other parts of the site. For instance, "TREAD Act" could link back to a specific practice page, the profile of one of the partners who specialize in the application of this statute, an event, a conference, or an article that speaks to this subject. These "lateral links" can create significant improvement both from an SEO and user-experience perspective.

Similarly, when drafting your profile, consider the references and links that can be made to specific industries.

Individual Marketing Plan

Describe Your Personal Marketing Goals for [year]

I. Developing Your Network and Reputation

Future employers and prospects perceive professional activities like writing, speaking, and industry- and association-oriented activities as indications of your knowledge and skill. Add these activities to your resume and LinkedIn biography, and share them through your social media outreach.

A. Networking

Networking is the foundation of client development. Build a network of the right contacts. After a thorough analysis, precisely identify the most likely accounting firms, organizations, and sources of new business for the job you are seeking and the practice you are trying to develop—your "target audience." Next, find out which industry or trade associations they belong to and which meetings they attend. Then join those organizations and work toward a leadership position. You can't get business if the people who hand out the business don't know, trust, and respect you. Networking is a critical, long-term professional-development activity.

I will actively participate as a member of:

• Industry or Trade Association(s) In which *industry* would you like to develop contacts? What groups do

your targets belong to?

• State Society of CPA These help professional development and build a strong resume. For business development purposes, it is better to be the only accountant in a roomful of potential clients than sitting among other accountants. Allocate your time carefully. As a young accountant, select *one* chapter and work toward a leadership position. *Get active and visible*!

Association/Section

Committee

B. Supporting Activities

Certain activities support the firm's marketing. (Select a total of 3.)

- I will create or regularly update my mailing list and LinkedIn connections.
- I will create or regularly update my biography and social media profiles.
- I will help draft or update **written promotional materials** (e.g., blog posts, social media, newsletters, etc.) targeting the following practice area or industry:
- Other, describe: ______

II. Developing Client and Prospect Relationships

It is essential to focus much of your efforts on maintaining and expanding existing relationships.

A. Strengthening and Expanding Existing Client Relationships

Roughly 80% of a firm's new business comes from the top 20% of its clients. Accountants should commit to strengthening, enhancing, and expanding these top relationships. The primary focus is to learn more about their businesses and industries, strategic business goals, and financial needs so that you can provide more informed and useful consulting. An added benefit of this enhanced understanding is that it positions you to identify new business opportunities. As the CFO of a Fortune 500 company said, "If you're not willing to take the time to learn about me, you do not really want my business." List the current clients you will work to build or strengthen your relationship.

Existing Client's Name: _____

- Company Research. It is vital to have current information about companies in your chosen industry. I will review their website to learn more about their company and industry so that I can serve them better. I will create a Google Alert with the company's name (see www.google.com/alerts)
- **Company Visit.** I will seek to visit a company's facility to learn more about them so that I can understand their business and later enhance the service I can provide. I will tour the facility and meet their people, but *I will not seek to market* to them in any way. Instead, I will learn

about their goals, personnel, products, and operations.

- Attend Trade Conference. I will attend the relevant trade association conference to learn more about my chosen business and industry.
- **Read Industry Periodicals.** I will view online and/or subscribe to (and *read*) the industry's trade journal(s) or blogs, to learn more about this type of business, industry, and the relevant jargon. Companies will be happy to learn of my interest and inform me of the best publications to read.
- Write Industry Article. *This year*, I will write an article or blog post, ideally co-authored with a client, making them a valuable contact. (I will likely do 90% of the actual work.)
- Make Conference Speech. *This year*, I will arrange to speak at an association conference on a topic of particular relevance to this industry, co-presenting with an industry expert, if possible.
- Entertain Client. Every two months, I will entertain someone in this industry for a meal, event, etc.
- Add to Mailing List. I will ensure that I add this client and its key personnel to my LinkedIn connections and my contact list.

Target Marketing Worksheet

Niche/Industry Marketing Worksheet

What industry or niche specialty practice should you focus on?

Target companies must be appropriate to the size of the firm:

- What's your niche/love?
- What work do you want more of?
- Are there people/industries you particularly enjoy?
- What types of companies are likely to hire you?

What skills, interest, or passion leads to an appropriate target?

- Is there something interesting or unusual about you?
- Does a previous job or career provide unique insight?
- Did you grow up in a family business?
- Does your spouse's job create some initial contacts?
- Does an existing client provide industry experience?
- Do you have a victory or case study to help you get started?
- Do some personal connections give you a leg up?
- Do you have a hobby that engenders useful insight?

Select one industry group or trade association.

Browse through Gale Publishing's *Encyclopedia of Associations* and select a little-known, niche-oriented trade or professional association to focus your marketing efforts. Ideally, a national organization with a nearby local chapter where you can concentrate your monthly networking activities. Surround yourself with *clients*, not competitors.

- Focus most of your marketing activities on this group
- Must be *active* and *visible*
 - o Attend at least 8 of 12 monthly meetings
 - o Write an individual marketing plan to include networking, social media, tailored biography, articles or blog posts, speeches, public relations, ads, *etc*.
- Work to a leadership position
 - o Committee chair
 - o Conference chair
 - o Membership committee

Some ways to focus your practice, a health care example:

- Geography: "National" is usually too broad to start. Define a narrower geographic region.
 - o Size of business: Focus on a particular segment of the market (e.g., just small or large manufacturers).
- Type of business: Subset of a broader industry (e.g., food and beverage manufacturers).
 - o Specific type: Focus on a particular kind of food and beverage manufacturers (e.g., bakeries, or breweries).
- Practice area: Specialize in a narrow space (e.g., Wine & Spirits).
 - o Or a combination: Select two among the list (e.g., craft brewers in Northern California).

<u>"So, what do I do after identifying some likely organizations?"</u>

- Contact them; the information is in Gale Publication's "Encyclopedia of Associations."
 - o "I represent companies in your industry and would

like to learn more about your association."

- o "Do you have a local chapter?"
- o Request a membership kit
- Learn about pricing, benefits, member demographics.o Are they your targets?
- Review the website, conference schedule, print and online publications, etc.

So, what's the plan?

- If they say, "We don't accept [vendor] members."
- You should seek to show them how useful you can be to their members, e.g., "I can help your members avoid problems, protect themselves, save money...."
- Write articles for magazine, newsletter
- Preventive monthly column or blog posts
- Local or national conference speeches
- Network monthly at local meetings
- Advertise

Summary

Focusing your marketing clarifies your message and identifies how to use the standard tools most efficiently and effectively. Your marketing plan will direct your efforts including, for example:

- Networking **A finite audience** to meet.
- Website
 Publish a small blog directly on point.
- Research Learn the details of **one specific industry**.
- Biography
 Tailored experience to describe on your website.
- Social media

Use specialized SEO words, industry terms. Enhance your LinkedIn bio. **Twitter** can establish expertise with the media.

- Brochure or one-pagers (print or electronic) **Target them** to the group's specific needs.
- Articles **A focused message** is easy to discuss in print or blogs.
- Speeches, newsletters You have an **interested audience** and a narrow topic.
- Public relations, quotes
 You're the expert, so reporters need you.
- Advertising **Inexpensive placements** in targeted publications or online.

Acknowledgments

A particular thanks to our tremendously helpful contributors.

Tim Shannon

Chief Business Development Officer, TerraLex Former Chair of Marketing, Baker Tilly International

For his extremely valuable insight and assistance.

Joy A. Long

Director of Marketing Ostrow Reisin Berk & Abrams, Ltd. (ORBA)

For her continuing support.

Andrew Fishman, LSW

Our vigilant, diligent copy editor.

Connect with Ross

linkedin.com/in/rossfishman

@rossfishman

rossfishman.com

Subscribe to our Blog

fishmanmarketing.com/blog