

AAM Members Share Their Best “Tech Savvy” Practices

So how are AAM members using the latest technology to enhance their marketing efforts? We posed this question to AAM Discussion List participants, and heard from several members who were willing to share their firms’ best “tech savvy” practices. Responses ranged from e-mail marketing to podcasts to posting video on YouTube. We hope their experiences will help you in developing your own “tech tools!”

The team at **Porter Keadle Moore, LLP** (11 partners, 95 staff, Atlanta, Ga.) encourages staff to maximize the use of LinkedIn® in their business development process. “After convincing our IT department to allow our professionals to access LinkedIn® from the office (it was previously a prohibited site for security reasons), we encouraged our professionals to create user profiles and most importantly focus on their connections,” explains **Laura Snyder, Director of Marketing**. “Our marketing department then proactively searches those connections for companies on our radar screen or in our industry niches in an effort to reach out to prospective clients. For example, prior to attending an event, we cross reference the event attendee list against our LinkedIn® connections. When at the event, we are then armed

with information regarding the connections we share and we can more comfortably approach these individuals and begin conversations. Having a profile on LinkedIn® is one thing, but taking those relationships and connections to the next level is helping us more effectively grow our business.”

In their attempt to realize the full benefit of e-mail marketing, **Somerset CPAs, P.C.** (25 partners, 130 staff, Indianapolis, Ind.) started using Swiftpage to send e-newsletters and e-vites to their seminars in late 2006. According to **Melissa Farmer, Senior Marketing Manager**, “We learned about Swiftpage through Sage Software. We are a Sage reseller for MAS 90/200, Abra and Peachtree, and Swiftpage is a “Sage preferred vendor,” so they were a good match for us. They provide some pre-designed templates with Sage sales literature as well as generic pre-designed templates, but we generally create our own HTML design and then upload it into their program. There are many of these types of e-mail programs on the market, and they really are a must-have to keep your company in compliance with the Federal CAN-SPAM Act. In addition, the tracking reports are very valuable. We review the reports from each e-mail we send to see who opened it, who clicked through to

Page 3 ➤

Marketing’s Tech Tools

- | | |
|---|---|
| 2 Letter From the President | 9 The Partner’s Perspective... |
| 4 Member Voices | 11 Marketer Toolbox |
| 6 Top Ten SEO Tips | 11 Committee News |
| 7 AAM-MAA Best Practices | 12 Barry C. Melancon to Speak at AAM Summit 2009: Marketingpalooza |
| 8 Client Portals and the Accounting Profession | Online: AAM New Members |

Anne Angera and Lisa Rozycki – Issue Editors

MarkeTrends is designed by PDI Global, Inc. (www.pdiglobal.com)



www.accountingmarketing.org

AAM Members Share Their Best "Tech Savvy" Practices

continued from page 1

what, which e-mail addresses bounced and much more. Since we started sending our newsletters via e-mail instead of print, we have saved over \$30,000 per year in printing and mailing costs. With the printed/mailed newsletters, we had no idea if anyone was actually reading it or not — we now know that approximately 25% of the people we send our e-news to read it and we know which articles they read. Other benefits — it's easier for the recipient to ask questions with simple click-throughs, it's easier for them to forward the information to business associates or family members, it gets the news in front of our clients faster — we can send information about things like the Emergency Economic Stabilization Act of 2008 as soon as it happens."

"The clients and employees of **Stambaugh Ness** (9 partners, 80 staff, York, Pa.) have benefitted from our technology expertise for quite some time," says **Marketing Manager Cheryl Smyers**. "Technology trends are advancing so quickly that it is sometimes difficult to keep up, but we really have no choice in today's very competitive business environment."

Smyers notes the firm decided to start a weekly eNewsletter nearly three years ago when client evaluations indicated they wanted more information from the firm. Additionally, the firm sends regular, specific messages targeted to segments of the newsletter database. "The power of our e-newsletter and e-mail campaigns lies in our process to continually update the database," she adds. The newsletter database is separate from the firm's CRM program which tracks and stores all new business leads from inception to resolution. In their effort to make the most of the latest tech trends available, Stambaugh Ness also:

- Uses podcasts on its Web site to promote services and help with recruitment
- Maintains a presence on FaceBook, MySpace and LinkedIn® to help with recruitment

- Sends an eNewsletter to college students, serving as a marketing tool
- Hosts a recently launched Intranet featuring blogs by the company's President and CFO
- Creates videos of internal training sessions for use with its new employee orientation program
- Displays two LCD panels in its main lobby with a looping presentation featuring various aspects of the firm's culture and services
- Utilizes Webinar resources to allow long-distance clients to participate in seminars
- Incorporates YouTube video blogs and plans to post a YouTube video
- Is in the midst of creating a hard-cover "photo book" (presently in construction online) that will showcase its company culture for recruits

The firm also has an internal IT staff to keep technology on track in addition to an IT affiliate to serve its clients. "All of this activity is being driven by our President and COO who appreciates how technology can give us the advanced resources we need to effectively serve our clients and grow our business," Smyers says.

Bonadio Group (36 partners, 350 staff, Buffalo, N.Y.) has been successfully utilizing podcasts as part of a thought leadership campaign. According to **Laura Del Monte, Marketing Manager**, "We began recording podcasts as part of our Thought Leadership program in April 2007. One of our main objectives was to establish the company as a thought leader in the industry. At the time, none of our competitors were doing it and we felt it was a way to show our clients and prospects that Bonadio was a company with state-of-the-art technology and a company that would deliver on our promise of bringing these value-added pieces."

Del Monte continues, "We record at least one new podcast per month and then notify our clients/prospects of their availability through our electronic newsletter. Each Viewpoint is available in a printable format along with a downloadable MP3 which can be played

directly in your browser. You can also subscribe to our podcasts through iTunes, Odeo or directly. Subscribers get an immediate notice whenever a new podcast is available. We currently have over 50 podcasts recorded on a variety of topics, all of which can be accessed on our Web site under our Viewpoints section. The nice part about the podcasts is they're real: it's the actual partners recording these podcasts with different personalities and different voice tones. We also use a voice over personality to record the intro/exits for all our podcasts, creating a uniform, professional message to our listeners."

"Podcasts are recorded on a user-friendly program that costs the firm about \$10,000, including all the equipment and software. Recordings take about 10 minutes for the actual read through, after which our Marketing Coordinator, Jennifer Fehrenbach, spends about 30 to 60 minutes editing them. The opportunity to record a podcast is open to all managers, principals, and partners, which helps us bring a variety of voices and styles to the Web site and keeps our resources strong."

Shannon Mayforth, Marketing Manager at Citrin Cooperman (75 partners, 310 staff, New York, N.Y.) uses e-communications and social networking in their firm's marketing efforts. "We send out a monthly e-newsletter to roughly 10,000 clients and contacts providing them with practical, actionable tips to help them run their business better. This e-newsletter also features articles written by Citrin Cooperman partners and lists upcoming Citrin Cooperman events. After each issue we send a "click-through" report to partners and staff to highlight which contacts are opening the e-newsletter and which articles they read. This serves several purposes:

1. The author will know which of his/her contacts have read the article and whether any follow-up with that person is warranted
2. The niche committees (and marketing) will be aware of what articles resonate more with our readers

AAM Members Share Their Best “Tech Savvy” Practices

continued from page 3

3. The sales department follows up on any hot leads
4. CC partners/staff will be more informed about what their clients/contacts are reading and can stand ready to introduce a partner, for instance, to an attorney who read his/her contributed article

We’ve also ventured into the world of YouTube. Our second annual Above

the Bar Awards in May 2008 brought together over 150 members of the legal community in Westchester County, New York. Members of the Westchester legal community nominated candidates for a number of awards recognizing their achievements. A panel of judges selected winners in each category and presented the awards at a cocktail reception. Our partners in the event included Pace Law School, Westchester County Bar Association, Westchester Business Journal, and Mahopac Bank.

Over 150 attorneys, judges and area businesses attended the catered evening event at The Judicial Institute, Pace Law School. One post-event follow up effort included sharing video footage from the event through YouTube. An e-mail was sent to select attendees with a link to the video and a message congratulating the winners. Using YouTube allowed us to reach out to our contacts in a new, fun and dynamic way — plus, they had fun seeing themselves on YouTube!” *AA*

Reprinted with permission from the November/December 2008 issue of MarkeTrends, copyright by the Association for Accounting Marketing, 14 W. Third St., Suite 200, Kansas City, MO 64105; 816.221.1296