

**Intuit***Academy*

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Effective Marketing for  
Accounting Professionals

**intuit.**

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## About the Author



**Michelle L. Long, CPA, MBA**  
*Owner, M. Long Consulting, LLC*  
Author of: **Successful QuickBooks Consulting**  
Lee's Summit, Missouri  
[www.MLongConsulting.com](http://www.MLongConsulting.com)  
[www.SuccessfulQuickBooksConsulting.com](http://www.SuccessfulQuickBooksConsulting.com)

Michelle L. Long, CPA is an Advanced Certified QuickBooks ProAdvisor, a national trainer for Intuit and represents Intuit at various conferences throughout the United States. She is one of the elite few members of the Intuit Trainer/Writer Network—Tier 3 and is also a consultant with Intuit Product Development. She has written and recorded numerous courses for Intuit Academy. Michelle is the author of the book **Successful QuickBooks Consulting: The Comprehensive Guide to Starting and Growing a QuickBooks Consulting Business** and was the Technical Editor for Laura Madeira's book: *QuickBooks 2009 Solutions Guide*. She is a Certified QuickBooks Enterprise ProAdvisor, Certified QuickBooks POS ProAdvisor, and Sleeter Group Certified Consultant.

Michelle is the owner of M. Long Consulting, LLC, which provides QuickBooks consulting and training, CFO advisory services, and coaching to growing businesses and entrepreneurs. She is an Adjunct Professor of Strategic Management at University of Missouri—Kansas City and formerly as an Adjunct Professor of Entrepreneurship at Johnson County Community College, Michelle has taught FastTrac Business Planning and Entrepreneurial Marketing.

Michelle was named a Financial Services Champion of the Year for 2007 by the Small Business Administration in recognition of her dedication to helping entrepreneurs and small business owners.

Michelle is a Certified FastTrac Facilitator and has facilitated the Ewing Marion Kauffman Foundation's FastTrac NewVenture program and Listening to Your Business workshop. She has been instrumental in helping hundreds of entrepreneurs start and grow their business.

Before starting her own consulting practice, Michelle worked with Price Waterhouse, an international public accounting firm; Baird, Kurtz & Dobson, a regional public accounting firm; and Hallmark Cards, Inc. She earned a Bachelor of Science in Accountancy from University of Missouri-Columbia, and an MBA in Entrepreneurship from University of Missouri—Kansas City.

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## Introduction

Often accounting professionals are somewhat uncomfortable with the concept of marketing our practices. How can we make it easier on ourselves?

It starts with a different way of thinking about marketing. Once we get that fundamentally understood, we can move on to developing a strategy, choosing tactics we are comfortable with, marketing our value and creating satisfied clients.

Marketing is about creating awareness, generating interest and inciting action for your valuable services. You are a solutions-provider for potential clients who need or desire what you have to offer. Marketing helps let them know you exist!

True marketing is not about hype. Unlike some products you purchase that do not meet expectations, you fulfill your promise of delivering quality service. You have substance. Marketing starts with you having confidence in what you do and understanding that your services fill a need.

Now with that shift in perspective, it's time to get down to how you can market your services. This manual provides you with tools to enable you to put a thoughtful, effective marketing program in place.

This course manual contains several checklists or worksheets to help you implement the specific marketing methods that you choose to implement to reach your target market. Social media is increasing in popularity and these new, online marketing methods are introduced in this course as well.

Your overall marketing strategy involves several pieces which will be covered in this course. This course will discuss clarifying your organizational identity and identifying your target market. Based on this, you'll develop your marketing strategy and determine which marketing methods or tactics you'll implement to reach your target market.

Throughout this course there are several articles or checklists by other authors and they are appropriately noted. There are several articles by John Jantsch in particular. John Jantsch is a veteran marketing coach, award winning blogger and author of *Duct Tape Marketing*. His articles that are included in this course (and many others) are available in the Intuit Community Library (<http://community.intuit.com/quickbooks/library>). The Library also has webinars, podcasts, and more on a variety of topics for small business owners as well as QuickBooks topics.

## Determine Your Organizational Identity

### **What is Your Mission or Vision for Your Business?**

You should consider how large and profitable you want your business to be? How many employees do you want? Do you want one office, several offices, or a virtual business? Or perhaps you want to remain a sole proprietor. You determine the goals for your business.

What are your principles or values for your business? Are there certain things that are non-negotiable? There may be some clients or engagements that you choose not to accept.

Who are your ideal clients? Who do you like and prefer to work with? How would you describe them? These are the types of clients you want to target with your marketing methods.

What important customer problems do you solve? What services do you enjoy providing vs. are there some services you do not want to provide?

Sit down for 10 – 15 minutes and describe your ideal practice in 3-5 years from now. What does it look like—are you in an office? Do you have employees and how many? Are you operating virtually with associates? What services or work are you performing? What types of clients are you working with? This is your goal and you should target these customers and services.

Take time to think this through as it becomes the basis for your brand and company image. If you need more questions to answer to assist you in defining your organization's identity, review the checklist below.

## *Checklist: 10 Powerful Questions: Organizational Identity*

What needs does your business satisfy?

- What service (or products) do you offer?
- What market do you serve?
- Who are your ideal clients?
- What are you really good at?
- What one word MUST be in your mission?
- What is unique about your business?
- How do you provide your services (or products)?
- Why does your organization exist?
- What is your driving force?

## Identify your Target Market

It is difficult to remain a generalist and stay current with the ever-changing tax laws, payroll rules and regulations, and industry specific rules. It is really difficult to remain current and knowledgeable as a generalist. So, many accounting professionals choose to specialize.

You may specialize based on your prior experience or expertise, your interest, or skills and talents. Many accounting professionals choose to specialize based on industry, services provided or stage of business. This helps to clarify your target market and the type of clients and services you wish to pursue.

This chart shows the Leading Niches and Specialties according to the Accounting Office Management and Administration Report's 2008 CPA Firm Practice Management Survey.

Small business	69.8%
Construction	55.2
Nonprofit	52.1
Business valuation	44.8
Estate planning	42.7
Health care	34.4
Litigation support	32.3
Personal financial planning	29.2
Government	22.9
Technology consulting	22.9



## *Target Niches Are Your Way To Riches – by John Jantsch*

### **Become known as an expert at serving a tight niche market and you can double your fees overnight**

Most small businesses try to serve giant chunks of the market in an effort to capture more business. The reasoning goes something like, "if I can be all things to all people...my market will be unlimited."

The reality is just the opposite. When you attempt to be all things to all people, the only thing that is unlimited is the amount of competition you will face from every other firm that claims to do what you do.

The surest way to tap into the potential of a market is to narrow your focus to one or two very specific niches within a target market group.

When you can become known for serving a tight niche several things happen.

- You get very good at serving that niche
- You can more easily communicate what your business does
- You can more effectively ask for very specific referrals
- You are more attractive to media outlets who need experts
- And the big one...you can double or triple what you charge

Most buyers out there, when given the choice, would rather hire someone who has specific expertise and emphasis on their type of business or need.

An architect would much rather hire "The Architect's Consultant" than a business consultant.

Someone who wants to learn a certain piece of software would much rather hire a company that features that software as their sole service offering.

When you become the preferred choice, or when you start to get calls from companies whose market you excel in, price is no longer the driving issue. When given enough information, prospects make buying decision based on value, not price. By communicating your expertise and focus on their business or problem, you instantly take a big leap in the value equation.

### **So, where to look for niches?**

Take a look at your current client base. Where do your revenues come from now? In some cases, it can simply be a matter of focusing on what you already do but repositioning the way you communicate.

Don't forget the 80/20 rule. Do 80% of your profits come from one or two services or products?

What about market niches? Do you find that you work better with accountants and doctors? Or maybe you seem to draw retail businesses.

Centers of influence. Where do you have a large number of contacts - your church, your religion, your school, a hobby, an Association, a part of town, etc.?

Your competition. Sometimes niches present themselves by way of your competitors - Either as a niche they are succeeding with or as a way to find gaps that are not being served.

### **An example everyone could learn from:**

The wireless phone industry has experienced tremendous growth over the past 10 years. Players have come and gone, technology has changed, and competition has been fierce. Do you want to know the company that has been the most profitable and grown the most throughout?

Nextel is now the #1 wireless provider in the country in terms of subscribers and profit. I spent a lot of time working in this industry, and I can tell you that the primary reason Nextel has come out on top is because they targeted a niche and let everyone else fight over the price shoppers.

Nextel's "walkie-talkie" technology offered something very appealing to a specific target niche and everyone else stayed away. Now, Nextel is leading the pack, and no one is nipping at their heels forcing them to offer profit killing promotions.

### **A couple more examples**

A financial planner - This successful planner played football in college and is very involved in his church. He has chosen to use those two niches and focus on folks close to the University and folks involved in the various circles in his religion. 95% of his new clients are voluntarily referred.

A software training company - This small business started out trying to promote its ability to train business owners to use any type of small business software. At some point, they became very good at one popular contact management program and redesigned their entire business around training business owners to use this program to grow their businesses. And the results have been stunning.

#### **An Internet Resource**

One of the ways to hunt for potential niches is find out what people are searching for. The Internet offers some great tools for just that. One of my favorites is a service called Overture. Overture is a pay-per-click web advertising service but for "niche hunting" they offer a tool that allows you to type in a keyword, such as software training, and see how many people have searched on that and related terms in the last month.

*John Jantsch is a veteran marketing coach, award winning blogger and author of Duct Tape Marketing: The World's Most Practical Small Business Marketing Guide published by Thomas Nelson. He is the creator of the Duct Tape Marketing small business marketing system. You can find more information by visiting <http://www.ducttapemarketing.com>.*

## Most Popular Marketing Methods or Tactics

To create your strategy or game plan of how to reach your target market, it is helpful to know the most effective and popular marketing methods for accounting professionals. According to the Accounting Office Management and Administration Report's 2008 CPA Firm Practice Management Survey, these are the most popular marketing methods:

Established or maintained Web site	74.5%
Cross marketing to existing clients	68.4
Networking with other professional firms	61.2
Owner membership in niche/trade association	56.1
Externally purchased newsletters	49.0
Soliciting client referrals	49.0
Speeches and publications by owners	46.9
Seminars	41.8
In-house newsletters	28.6
Electronic newsletters/updates	22.4
Client satisfaction surveys	17.3
Mass media advertising	16.3
Other	11.2
PR agency	6.1
Industry or trade advertising	NR

You can see that number one on the list is a website—it is imperative for all businesses to have a website. You'll also notice several that relate to networking, membership in associations, and creating referral relationships with others. Other effective and popular marketing methods include speaking and writing. All of these methods will be discussed in detail in this course.

## Marketing Tactics – Essentials

Every business should have certain marketing essentials. These include business cards and a website. If you are a Certified QuickBooks ProAdvisor, make sure you include the logo on your business cards and website. The logo helps with credibility and the brand recognition of QuickBooks. Your business cards and website should portray a professional image and be consistent with the identify you want for your practice.



### Business cards

Business cards are essential for networking and distributing to potential clients and must include your contact information but they can be much more. What do you hope to accomplish with your business card? Spend a few minutes defining up to three objectives.

As always, think from the potential client's point of view. What do they need to see on a business card and what's just nice to see? Think in terms of the content and the format. Consider the front and back of the card as potential marketing space.

There are numerous online companies which offer business card templates which make it quick and easy to create business cards. These online printers offer affordable business cards that are usually good quality. I have ordered business cards from Overnightprints.com twice and I was very pleased with the quality of the cards. You may want to consider an office supply store as well. Avoid printing your own business cards because the quality of the card stock does not present a good image for accounting professionals.

### Websites

Websites used to be a nice-to-have and are now a necessity. Some professionals choose not to create brochures at all and use the website as their electronic brochure. Marketing services through your website need not be a scary communications tactic. As long as you understand the thought process and inputs required, you have a valuable route to get to customers and potential customers.

Your website should include the following:

- Picture – people want to see who they would be doing business with and it helps with credibility.
- Services offered – focus on the benefits and solutions your provide.
- Client testimonials or client list – these help reassure potential clients and helps establish credibility and your reputation.
- About us – include details about your education, experience and credentials as well as for staff members (if appropriate).
- Content or tips and tricks – offer relevant and useful information to keep people returning to your website. This content also helps with search engine rankings.
- Register your website with search engines – make sure to register with Google, Yahoo, Excite and others. Focus on keywords and phrases to help with search engine optimization.
- Make sure to:
  - Triple check for misspellings or grammatical errors
  - Use bullet lists vs. lots of text
  - Avoid 'buy this' or 'save now' – consider the image you want to portray
  
  - Leave some 'white space'
  - Focus on headlines and catch=phrases

As a ProAdvisor (or with the purchase of QuickBooks 2009), you can get a free, 3 page website from Homestead for 12 months. There are numerous templates available which make creating a website quick and easy.

You can find numerous tips for creating business cards and websites by doing a Google search.

Find out how you can create business cards, design letterhead, develop a website and use your client references effectively by reviewing the following checklists.

## *Checklist: Developing a Business Card*

### **Determine**

- Any additional objectives for the card other than providing contact information
- The image you want to convey (firm and/or individual)
- Must-have information to be shared versus nice-to-have

### **Include**

- Name in bold, larger than your title
- Address. If you are virtual, consider using your home address since not having an address on the card implies you are small. If you do not want to use your home address, then you could get a PO box or alternate mailing address from the post office or a mail center.
- Organization's name and/or logo. If your logo does not incorporate the organization's name, add the name on the card.
- Phone numbers. Don't go overboard. Direct, fax, pager and cell at the most.
- E-mail address
- Website URL
- Tagline if information above does not clarify what you do or offer

### **Consider**

- Size: single-sided, front and back, fold-over
- Paper: glossy, textured, linen—must be good, quality card stock
- Style: Raised or flat print
- Color of cards
- Color on cards
- Font(s)
- Font size
- Use of bold, italics and underlining for emphasis

### **Order**

- Check more than one vendor for pricing
- Be very clear on instructions
- Proof a sample before printing
- Consider on-line vendors. Weigh price, convenience and choice limitations.

## ***Checklist: 10 Tips for Creating and Maintaining an Effective Website***

Courtesy of Joe CuvIELLO, **Pacificconcepts**

1. Keep it simple. The simpler, the better. You should be able to lay the design out two dimensionally on a piece of paper as a mock-up.
2. Don't over-design or over-engineer in an attempt to accommodate every conceivable customer request. 85% of the customers are looking for the same 15% of your content.
3. Choose one navigation scheme, either horizontal or vertical – but not both.
4. Choose a san serif font. For headlines, use bold 14 to 2 points. Use 12 point for other text.
5. It is not necessary to be fancy. Use clean, clear titles and images.
6. Allow breathing room. Eyes get tired if the screen is overwhelmed with text, has narrow margins and no white space. When eyes get tired, readers stop reading....
7. Joe on graphics "It's not about pretty pictures, it's about the value of the content."
8. Integrate raw feedback from your users. Watch them navigate your site.
9. Revisit the site every six months to make sure it is still in line with your strategy. Review monthly to determine if your pages are up-to-date.
10. Just because you are tired of your website, doesn't mean you should change the design. Redesign only if the organization has a new identity, strategy, or structure.

## Referrals – Find a ProAdvisor Website

Referrals remain the most effective marketing method for accounting professionals because we are selling professional services. It is imperative that you develop effective referrals from multiple sources.

The Find a ProAdvisor website can be a great source of potential clients and leads for many Certified QuickBooks ProAdvisors. Intuit markets the website and it gets over 40,000 hits per month from people looking for QuickBooks help and support. Intuit includes links to the Find a ProAdvisor website in many places including:

- EasyStep Interview
- Learning Center
- Help menu
- Welcome email for new registrations
- Intuit websites

**QuickBooks® Find-a-ProAdvisor® Website** OVERVIEW | FAQS | PROVIDE FEEDBACK

**Local QuickBooks Help**  
Certified QuickBooks experts known as ProAdvisors are typically CPAs, accountants, small business advisors or consultants who have been tested and certified on QuickBooks.

Certified ProAdvisors help businesses customize QuickBooks for their unique needs and help them get the most out of the software. ProAdvisors are also a great resource if you run into trouble with QuickBooks. ProAdvisor fees are typically reasonable and many businesses feel the investment is valuable.

Who are Certified ProAdvisors and why should I consult with one?

- They're experts in helping small businesses learn, use, and customize QuickBooks
- They're certified by Intuit
- Many are accounting and tax experts
- Many businesses are even more satisfied with QuickBooks after working with a Certified QuickBooks ProAdvisor, and feel they are a valuable investment.

[How it works](#)

[Frequently Asked Questions](#)

**Step 1: Input Your Location**

Distance:

Zip Code:

OR

City:

State:

**Step 2: Who are you looking for? (optional)**

Industry Supported:

Professional Designation:

Certifications Earned:

- QuickBooks Financial Software
- QuickBooks Point of Sale
- QuickBooks Enterprise Solutions

Potential clients can search by location, industry supported, professional designation, or certifications earned. This is your first impression for the potential client, so it is important to create a great profile! Keep in mind that you must get Certified to be listed in the Find a ProAdvisor website. The search results are ranked based on the following:

- Advanced Certified first
- Certified in the current year
- Location and number of years Certified

You want to get certified every year (as soon as you can so you're listed higher in the search results) and try to earn the Advanced Certification when you're eligible (after being certified for 3 consecutive years). You can get more details at ProAdvisor.intuit.com.

You should also encourage clients to submit a review or rating for you. This helps your credibility with potential clients and is the number one thing looked at by potential clients visiting the Find a ProAdvisor website.

Search Results - Click on Column Header to Sort by Each Column					
Certification	Name	Avg Client rating	Company Name	Distance	Details
ADV QB 2009, 08, 07, 06, 05, 04 POS v6, v5, v4 ES v7	Long CPA, Michelle L.	★★★★★ 5.0 out of 5 ( 2 Reviews) <a href="#">&gt;Read/Write Reviews</a>	M. Long Consulting, LLC Lees Summit, MO	0.0 mi	LOCAL EXPERT & Remote Consulting serving clients nationally. Specializing in Set-up & Training, Troubleshooting, Data-file Clean up, Per... <a href="#">SEE PROFILE</a>
ADV QB 2009, 08, 07, 06, 05, 04, 03, 00, 99	[Redacted]	★★★★★ Not Yet Reviewed <a href="#">&gt;Read/Write Reviews</a>	Lee's Summit, MO	4.65 mi	As a CPA with 10 years experience as a Controller along with 12 years in public accounting, I can help you set up your QuickBooks as well as train yo... <a href="#">SEE PROFILE</a>
ADV QB 2009, 08, 07, 06, 05, 04, 03, 02, 01, 00, 99 POS v5, v4	[Redacted]	★★★★★ Not Yet Reviewed <a href="#">&gt;Read/Write Reviews</a>	Leawood, KS	12.43 mi	<a href="#">SEE PROFILE</a>

It is interesting and helpful to know who visits the Find a ProAdvisor website, so here are some details to consider based on surveys of people who visit the website:

**Who's coming to the Find-a-ProAdvisor website?**

- 44% using QB < 1 year

**What do they need help with?**

- 38%....Setting up QB
- 49%... Using QB; specific task or function, intermediate training
- 42%... Ongoing help... bookkeeping or payroll processing

**What are they looking for?**

- **Distance** – “can't travel too far with my baby”
- **Industry Experience:** “I only consider those that have experience with my industry”
- **CPA or not** –some definitely want a CPA for tax prep too; others definitely do NOT want a CPA because some users view CPAs as more expensive and not as approachable
- **Certification** – ProAdvisor supports the same QuickBooks version that the client uses

**Which ProAdvisors are most appealing to customers?**

- Friendly, approachable, personable
- Conscientious, detail oriented!
- Trustworthy

**What's stopping customers from picking up the phone?**

- “Don't know how much it's going to cost me.”
- “Don't know if they can do the job.”
- Fear of the unknown!

**11% of all customers DID NOT GET A CALL BACK!**



## 10 Tips for a Great Profile:

1. Use language that speaks to your client and addresses what they are looking for.
2. Include your industry experience--# of years in business, # of clients, certifications, etc.
3. Speak benefits: will the client save time? Money? Peace of mind?
4. Personalize! Include photos and friendly language. Avoid corporate speak!
5. Fill out your profile—nothing is worse than an incomplete profile.
6. Give special attention to the first 100 characters—they are the primary ad words that display in the search results.
7. Include rates and packages—get rid of the mysterious black box!
8. Include client testimonials or references—emphasize client service.
9. Consider an initial free consultation to reduce fear.
10. Call out your availability! “I promise to return your phone call within 24 hours!”

### QuickBooks® Find-a-ProAdvisor® Website



**Michelle L. Long CPA  
M. Long Consulting, LLC**

Phone: [REDACTED]  
 Mobile: [REDACTED]  
[longmi@umkc.edu](mailto:longmi@umkc.edu)  
 Web Address: [www.mlongconsulting.com](http://www.mlongconsulting.com)  
 Contact Preference: Email  
 Will Respond By: Next Business Day



#### About Me & My Practice

**LOCAL EXPERT & Remote Consulting** serving clients nationally. Specializing in **Set-up & Training, Troubleshooting, Data-file Clean up, Periodic reviews, & Customizing QB** for your business! I've taught QB Seminars since 1999 for local Small Business Development Centers (SBDCs). I'm a **National trainer/writer for Intuit teaching other accountants about QB.** \*\*By customizing QuickBooks for the way your business or organization operates, you can improve the performance and profitability of your business. \*\*I have the experience and expertise to help you get QB working for you! When set-up properly, QB will provide you with the financial information you need to run your business!

#### Professional Designation:

- CPA (Certified Public Accountant)
- Accountant
- Bookkeeper
- Computer Consultant
- Educator/Trainer

**Years in Business: 17**

#### Other Designations/Credentials:

- Certified FastTrac Facilitator
- SBA Financial Services Champion 2007

#### Certifications:

- ADV** since 2007
- QB** 2009, 2008, 2007, 2006, 2005, 2004
- POS** v6, v5, v4
- ES** v7

## Referrals and Networking – Traditional Methods

As previously mentioned, referrals remain the most effective and popular marketing method for accounting professionals. The referral network is in place to add customer value through firms that have confidence in each other. For example, you can find other professional service firms who service the customer like you do and can complement your offerings. Finding or building a network may take time but having others know what you can do to add value can only help your firm. Referral networks can be a branch of your pipeline for both successful and fledgling firms.

Some good referral sources include:

- Current Clients
- Bankers
- Attorneys
- Insurance agents
- Other small business owners
- Family, friends and acquaintances
- Peers – locally and online networks

The best ways to develop referral relationships is from networking with others. You know you need to get out of the office, mingle with like-minded people and develop business. But where should you go? A myriad of leagues, chambers, societies, clubs and associations await your participation. Many are looking for members with just your talents and skills. Networking is more than just showing up at meetings. It is important to get involved, speak up and introduce yourself. Remember that networking is a two way street and you should reciprocate with referrals to others. Use the tips below for advice on effective networking. Find out how you can network with substance.

Some traditional networking ideas include:

- Chamber of Commerce
- Other local groups and associations
  - Networking groups like BNI
- Non profit organizations
  - Church
  - Kids – PTA or PTO, Scouts, Little League and more
  - Home owners association

## ***Checklist: Taking the Work out of Working a Room***

Courtesy of Barbara Mercer Nichols of **Rainmaker Strategies**

- Shift your perspective. Throw aside that mindset that you have to *sell* yourself. Networking is about having fun, meeting people and adding value. It's about building relationships and offering solutions.
- Think about your goal before you arrive – meeting as many people as you can and adding value.
- Keep the right perspective. You are not simply a financial services professional. Think of yourself as a host and the people you meet as guests. You know how a good host breaks the ice, makes others feel comfortable and puts people together? You can be that potential solutions-provider who is genuinely interested in his guests.
- Actively listen to those you meet and find ways to connect. You are not in the conversation for you – but for them.
- Begin by asking about your conversation partner?
  - "What kind of work do you do?"
  - "What do you love most about your work?"
  - "What challenges keep you up at night?"
- When the conversation turns to you, what do you say? Answer who you are, what you do and how you help others. "I'm John Smith of XYZ Bookkeeping and I keep my clients out of trouble!"
- While conversing, acknowledge whatever connection you recognize. Determine if you can solve a problem, connect the person with someone else who offers a solution or simply be supportive.
- Swap business cards only when there is a good reason – if you see client potential, want to make a referral or are intending to send them something, if you want to contact them in the future or add them to your network or database.
- Chat a maximum of 7 to 10 minutes before moving on. That's enough time to connect and add value.
- How do you move on gracefully? Introduce your conversation partner to another person who joined your conversation circle and thank your initial partner.

## *Education is the Key to Effective Referral Marketing – by John Jantsch*

One of the few complaints I hear from small business owners when it comes to generating business or leads by way of referral is that too many of the referrals they are offered aren't a fit for the business. The referrals are either unqualified, don't need the firm's offerings, can't afford the product or just don't fit the typical profile of an ideal client for the receiving firm.

If this is your referral reality, then you know that chasing leads that don't fit your target client can be a grand waste of everyone's time and energy. The primary reason for this affliction though is that most small business owners and independent professionals don't take the time to educate their referral sources.

The typical referral request may go something like, "Know anybody that needs what we do?" Okay, "I know lots of people; here you go. Have at it!"

The solution to this is really quite simple. I've created a tool I call the Perfect Introduction, as part of my Referral Flood program. The Perfect Introduction is a document (although it can take many forms including a web page) that contains answers to the following questions.

### **How Would I Know if I Spotted Your Ideal Client?**

Describe, in great detail, the type of clients you work best with. This step will help assure that you get highly qualified leads and make it easier for your lead source to think of prospects that fit a narrow description.

### **What Would I Say to Best Position Your Business?**

Give your referral source the exact words you would like them to use when introducing your products and services to prospective referrals. Give them a simple, memorable way to explain the benefits you have to offer. Remember, many of your best referral sources may not be actual clients who can talk eloquently about your brilliance, give them your core marketing message so that the expectation they set remains consistent.

### **How Can You Add Value to my Relationship With a Referred Lead?**

This is a multi answer question. Show your prospective referral source what you do to make them look good and outline any offer you might have cooked up to reward and motivate your referral sources. By the way, money isn't always the best referral motivator. Showing appreciation, helping referral sources meet their goals, and making referral sources look good are all powerful motivators.

### **What do You do With the Leads You Receive by Way of Referral?**

Outline the exact steps you take when you receive a name or introduction. This step allows the referral source to get comfortable with your marketing process. Everyone has some fear that the referred party may abuse the relationship by hard selling or calling every night at dinner time. Put these fears to rest by outlining your very educational approach. (That is your approach, right?)

Now that you have your Perfect Introduction document in hand you can go out there and confidently let the world know that you are someone they can feel great about referring.

Another very powerful aspect of this tool is that often, even if you don't realize it, you are in competition with others who are seeking referrals. Service professionals seeking referrals, for instance, heavily target CPAs. With your referral process outlined in a very professional manner, you will stand out in the referral competition for some of the best potential referral sources.

### **And Now a Powerful Twist**

Once you have created your Perfect Introduction, you should also consider using this tool to open doors with potential referral sources. Send a letter to 100 targeted referral sources with a copy of your Perfect Introduction and a blank Perfect Introduction form. Inform the recipient that you have clients and prospects that you believe could benefit from their products and services. Ask them to complete the enclosed Perfect Introduction form (using yours as an example) and send it back to you as soon as possible. Do this and you will find new referral marketing doors swinging wide open for you. In addition, you will be better prepared to give referrals to your clients and prospects, kicking the referral cycle into even higher gear.

*John Jantsch is a veteran marketing coach, award winning blogger and author of Duct Tape Marketing: The World's Most Practical Small Business Marketing Guide published by Thomas Nelson - due out in the fall of 2006.*

## Referrals and Networking – Online Methods (Social Media)

As accounting professionals, it is a challenge to stay current with the ever-changing rules and regulations. How can we possibly keep up with the rapid changes in technology and social media that is becoming increasingly popular? Hopefully, you can learn the basics here and focus your efforts on what will be most effective based on your target market. First, here is a good article that explains social media.

### *How to Use Social Media to Grow Your Business – by Jeff Korhan*

Sometimes referred to as new media, social media marketing (SMM) is a collective term that includes blogs, micro-blogs, and social media networking and marketing sites. You may know them better by their brand names. The most popular micro-blog is Twitter®. Social networking sites include LinkedIn®, Facebook® and Plaxo®. YouTube® is popular for social marketing, as are Stumbleupon®, and Digg®. You can use some or all of these and other social media marketing sites to positively impact your bottom line!

#### **Connect**

Using SMM requires a clear understanding of strategy, which we'll get to. For now, just know that using social media effectively is a process of connecting, communicating, and then building community. You need to connect with people so you can tell your story. All of those sites mentioned above help you make that connection in different ways. To get started, you need to make an introduction. If you are meeting someone in person, you may ask: "Tell me about yourself (or your business)." Using SMM, you'll accomplish this with a bio - a descriptive biography of you and your business, whose sole purpose is to get the online conversation going in the right direction. For example, you may be wondering how I came to write this column and if we have anything in common. So, here goes. I've been a marketer my entire career. My first job after earning my MBA was in sales and marketing with Conoco Phillips. I advanced to Regional Marketing Manager before leaving after 10 years to launch my landscape contracting business. Everything I knew about marketing to corporations was of little value in my residential landscape business, except for one. I needed customers, and the only way to get them is to get out and meet people. I joined organizations in my community like Rotary International and the Chamber of Commerce, and as a result, everything worked out fine. That's my story. When I hear yours, we'll have something to talk about. We'll just need a place where we can communicate.

#### **Communicate**

When I was growing my landscape business, I had a lot of meetings on job sites. In my corporate work, we met at the water cooler in the office, in airports and at conferences, or wherever we could get together. There are all kinds of places to meet and build relationships with people. These places are called platforms. They are where people get together to share valuable information and build relationships that encourage business deals. That's what social media will do for you. It's a digital platform that helps you get your message out - in words, images, videos, and more. It's important to remember that social media doesn't replace what you are doing now that is working; it complements it. Social media just works to connect you with more people, more frequently, to get more business accomplished.

#### **Community**

Everyone has a story to tell. The challenge is making it interesting so that people want to hang around and learn more. Social media sites allow you to have a dialogue. This is what makes them better than websites for promoting your business. Websites are a monologue - just you talking. Blah, blah, blah. That's boring! So, lighten it up. Don't push your product. Just help us get to know you so we want to buy your product. Get us excited. Make us laugh. Dazzle us with information about something nobody has told us about. Tell us how you got here, where you came from, and who helped you along the way. Use whatever makes you more genuine, authentic, and real. This is part of the magic of successfully marketing with social media.

## Getting Started

Some of you are making progress with social media marketing now, while others haven't yet started. Don't worry; we'll bring everyone together in the next column when we start to learn the unique qualities of each individual platform and how to use them more effectively. For now, let's focus on strategy. To be successful with any marketing medium, you have to be clear about your objective and have a means to measure your success. Obviously, you have business objectives for revenue and profit. Now consider how social media can help you accomplish those objectives. For example, if your business success depends on having lots of customers, you may wish to focus on growing a larger 'fan base' of people that are familiar with your business and what it has to offer. If your projects are specialized, you may prefer to carve out a tight niche for a specialty in which you are the most likely to succeed. Finally, you may be seeking to establish a new identity to rejuvenate your brand. One obvious one that comes to mind is being the green business leader in your market.

Jeff Korhan

[speaker@truenature.com](mailto:speaker@truenature.com)

<http://www.truenature.com>

Jeff blogs at <http://www.thegreenmarketingguru.com>

Article Source: [http://EzineArticles.com/?expert=Jeff Korhan](http://EzineArticles.com/?expert=Jeff_Korhan)

## Networking with LinkedIn

LinkedIn is a business oriented networking site. They say that executives from all Fortune 500 companies are members. LinkedIn allows you to create a profile with an online resume, and recommendations from others. You can find and be introduced to other professionals that can help you grow your business. It is another form of networking and building relationships. You can connect with peers, potential clients, former classmates, and others.

You can edit your status to let others know what you're working on or info that you want to share with them. It is a great way to keep updated and in contact with others quickly because you get emails with updated information periodically.

You start by creating a great profile—including a picture, description of your business, and your experience and education. You can include as much detail as you want to disclose.

### Profile

[Edit My Profile](#) [View My Profile](#) [Edit Public Profile Settings](#)

**Michelle Long, CPA, MBA** you

Author of the book 'Successful QuickBooks Consulting',  
Specializing in QuickBooks Consulting/ Training,  
National Speaker

Kansas City, Missouri Area | Accounting

Michelle Long, CPA, MBA is writing/updating courses for Intuit! I'm lovin it! 2 hours ago

<b>Current</b>	<ul style="list-style-type: none"><li>Owner at <b>M. Long Consulting, LLC</b></li><li><b>National Trainer for Accountant Trainer and Writer Network (Tier 3) at Intuit</b></li><li><b>FastTrac Facilitator and Coach at Kauffman Foundation</b></li></ul> <a href="#">see all...</a>
<b>Past</b>	<ul style="list-style-type: none"><li>Owner at Michelle L. Long, CPA (Sole Proprietorship)</li><li>Corporate Financial Reporting Analyst at Hallmark Cards</li><li>Senior Auditor at Price Waterhouse</li></ul>
<b>Education</b>	<ul style="list-style-type: none"><li>University of Missouri-Kansas City</li><li>University of Missouri-Columbia</li></ul>
<b>Recommendations</b>	2 people have recommended Michelle
<b>Connections</b>	229 connections
<b>Websites</b>	<ul style="list-style-type: none"><li><a href="#">My Company</a></li><li><a href="#">My Book</a></li></ul>
<b>Public Profile</b>	<a href="http://www.linkedin.com/in/michellellong">http://www.linkedin.com/in/michellellong</a>

[Send a message](#)

[Add Michelle to your network](#)

[Forward this profile to a connection](#)

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**We Left Consulting**  
Now We Make \$71,592 A Month. No Selling. Real System. \$395 Start  
[7FigureMentors.biz](http://7FigureMentors.biz)

**St. Louis IT Consulting.**  
Need IT Consulting Services Company Microsoft Gold Certified Partners.  
[www.Acropolistech.com](http://www.Acropolistech.com)

**Michelle's Connections (229)**

**Cheryl L. (Platt) Phillips, CPA**  
Independent Accounting Professional

**Rhana (Reid) Castle**  
Art Director at Vance Publishing

**Jill (Stiner) Bergthold**  
Sales Associate at Coldwell Banker Commercial

Once you start connecting with others, your potential network really grows fast. This can allow you to get connected with others you might not have been able to reach otherwise. There is a vast network available:




## Network Statistics

---

Here you see statistics about your network, including how many users you can reach through your connections. Your network grows every time you add a connection — [invite connections now](#).

### Your Network of Trusted Professionals

You are at the center of your network. Your connections can introduce you to 1,549,300+ professionals — here's how your network breaks down:

<b>1</b>  <b>Your Connections</b> Your trusted friends and colleagues	<b>229</b>
<b>2</b>  <b>Two degrees away</b> Friends of friends; each connected to one of your connections	<b>18,100+</b>
<b>3</b>  <b>Three degrees away</b> Reach these users through a friend and one of their friends	<b>1,530,900+</b>
<b>Total users you can contact through an Introduction</b>	<b>1,549,300+</b>

2,297 new people in your network since January 20



Just like with traditional networking, you need to get involved on LinkedIn. You should seek out and join groups. You may choose to join an Alumni group, local groups, industry groups, or something else. You should also consider joining industry groups based on your target market.

You should not just create a profile and/or join a group. You should get involved in the discussions, post relevant and useful news articles. You're building a reputation and making connections with others.

"LinkedIn has been useful in finding strategic partners and occasionally finding new projects. Additionally, I have found that Linked In is a great venue for getting questions answered and raising awareness for your business. The trick for us has been to network within groups like this, answer questions and approach Linked In with a Giver's Gain mentality."

Jason Rosen, Rosen Professional Services, New York, NY – Member of Successful QuickBooks Consultants Group.

The screenshot shows the LinkedIn Groups interface. At the top, there's a blue header with 'Groups' and navigation tabs for 'My Groups', 'Groups Directory', and 'Create a Group'. Below this, the 'My Groups (10)' section lists several groups. The first group, 'Successful QuickBooks Consultants / Consulting', is highlighted with a red rectangular box. Other groups listed include 'FastTrac Alumni Group', 'The Sleeter Group', 'Mizzou Alumni', 'The Official Intuit Community Group', 'Business Intelligence and Analysis', and 'CPA (Certified Public Accountant)'. To the right of the group list are two light blue boxes: 'Groups Directory' with a 'Find a Group' button, and 'Create a Group' with a 'Create a Group' button.

I'd invite you to join my group (Successful QuickBooks Consultants / Consulting) to network with other ProAdvisors, Intuit employees, and related vendors. The group has almost 500 members and is fairly active with discussions and news posts.

When posting in the discussions, you can create name recognition and awareness of your business and/or services. Next to your post will be your profile picture (you should upload one) along with a brief bio you create. Here is a sample discussion to illustrate



**Jim ('Anchorman') Flauus**  
President, Anchor Accounting & Tax  
[See all Jim \('Anchorman'\)'s discussions »](#)

### How do I maintain both a 2008 QB program and 2009 QB program on my computer?

I want to be able to exchange Acct's copies and backups with existing clients who haven't upgraded to 2009, or new clients who still use even older versions (ie., 2007). How can I do this?  
Posted 10 days ago | [Reply Privately](#) | [Make Featured](#) | [Delete discussion](#)

#### Comments (6)



**Mike Crosa CPA**  
**QuickBooks Coach**  
QuickBooks Trainer at BusinessProfits.Com

Hi Jim

Just install the QuickBooks programs into different file folders. You should have no problems. On my computer I have the QuickBooks programs from 2006 to present as well as POS and Enterprise. You can't run Enterprise and QuickBooks Pro for the same year together but you can have different years running at the same time.


Posted 10 days ago | [Reply Privately](#) | [Delete comment](#)



**Mercie Dahlgren**  
CPA and Accounting Consultant, Owner, ASD Business Services, QuickBooks Pro Advisor, Peachtree and Microsoft SBA

I'm with Jim on this. In fact I have 2007, 2008 and 2009 in both Premier and Enterprise on my computer.

Posted 10 days ago | [Reply Privately](#) | [Delete comment](#)



**Michelle Long, CPA, MBA**  
[YOU](#)  
Author of the book 'Successful QuickBooks Consulting', Specializing in QuickBooks Consulting/ Training, National Speaker

You will only have 1 year backwards compatibility (with some limitations) using an Accts copy with QB 2009. One way to serve clients with older versions of the software (if you don't have that year), is to log into their file remotely--then you're using their QB software. Otherwise, you'll need to get an older version of QB--try Ebay. Once you update a data file from an older version of QB into a newer version (ie 2009), they won't be able to open it again in their data file.

You can install multiple years of the program (as Mike and Mercie noted) on your

## Networking with other Social Media Methods

Social media is gaining momentum rapidly and as accounting professionals we need to learn about it and how to effectively utilize it. Always keep in mind your target market to help determine which methods to implement into your marketing strategy. Remember to maintain your corporate identity and professional image at all times. Also, your friends can see other friends' pictures, posts, and profiles too. Make sure you know who you are connecting with and whether it fits with the image you desire.

“Social media is not just for 'tweens and twenty-somethings anymore.

Facebook and Twitter are ways to communicate with and market to (carefully) a wider audience of clients and potential clients. First, I would recommend reading up on how companies are using the social media effectively - and ineffectively - so that you can step into this connected world confidently.”

Rich Walker, CPA | Intuit Inc. | Accountant Communications and Media Relations Intuit Inc.

### *Facebook, MySpace, and others*

In addition to business social networking sites, there are more personal social networking sites like Facebook and MySpace. Although primarily social many businesses have created a profile on them too. Some people have a Facebook page for their business and one for personal purposes. The company overviews for Facebook and MySpace state:

“Facebook gives people the power to share and makes the world more open and connected.

Millions of people use Facebook everyday to keep up with friends, upload an unlimited number of photos, share links and videos, and learn more about the people they meet”

“MySpace is an online community that lets you meet your friends' friends.

Create a community on MySpace and you can share photos, journals and interests with your growing network of mutual friends!

See who knows who, or how you are connected. Find out if you really are six people away from Kevin Bacon.”

### *Tips for Effective Use of Facebook or MySpace*

- Complete an appropriate profile with relevant information
- Include a picture
- Post and update on a regular basis
- Create events for special occasions
- Consider Facebook ads
- Create a group
- Join other groups

## Twitter

Twitter is a relatively new form of social media and appears to be growing in popularity fast! It was even mentioned in a recent episode of 'Brothers & Sisters' on ABC with Sarah feeling out of touch since she was unaware of Twitter and not a part of it. Here are details from the Twitter website:



### **About us**

Twitter is a privately funded startup with offices in the SoMA neighborhood of San Francisco, CA. Started as a side project in March of 2006, Twitter has grown into a real-time short messaging service that works over multiple networks and devices.

In countries all around the world, people follow the sources most relevant to them and access information via Twitter as it happens—from breaking world news to updates from friends.

### **Why do so many people seem to like Twitter?**

Simplicity has played an important role in Twitter's success. People are eager to connect with other people and Twitter makes that simple. Twitter asks one question, "What are you doing?" Answers must be under 140 characters in length and can be sent via mobile texting, instant message, or the web.

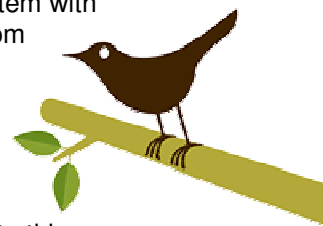
Twitter's core technology is a device agnostic message routing system with rudimentary social networking features. By accepting messages from sms, web, mobile web, instant message, or from third party API projects, Twitter makes it easy for folks to stay connected.

### **Isn't Twitter just too much information?**

No, in fact, Twitter solves information overload by changing expectations traditionally associated with online communication. At Twitter, we ask one question, "What are you doing?" The answers to this question are for the most part rhetorical. In other words, users do not expect a response when they send a message to Twitter. On the receiving end, Twitter is ambient--updates from your friends and relatives float to your phone, IM, or web site and you are only expected to pay as much or as little attention to them as you see fit.

The result of using Twitter to stay connected with friends, relatives, and coworkers is that you have a sense of what folks are up to but you are not expected to respond to any updates unless you want to. This means you can step in and out of the flow of information as it suits you and it never queues up with increasing demand of your attention. Additionally, users are very much in control of whose updates they receive, when they receive them, and on what device. For example, we provide settings for scheduling Twitter to automatically turn off at dinnertime and users can switch off Twitter updates at any point.

Simply put, Twitter is what you make of it--receive a lot of information about your friends, or just a tiny bit. It's up to them.



## *How to Use Twitter for Business – by Rich Brooks*

When I first heard about [Twitter](#)—a tool for instantly broadcasting the minutiae of your day and following the trifles of others—I couldn't imagine a bigger waste of time.

Why would anyone care about what I had for lunch, or whether someone was headed off to the gym? Why would any business person add more noise to the signal to noise ratio?

Or—thought I—maybe Twitter is the inevitable conclusion for a culture fascinated by fame, fed by sound bites, and forced to short attention by an overwhelming amount of data.

Well, as is often the case, Twitter is not the end of civilization as we know it; it may in fact be a glimpse into the future of communication. **Because, at its heart, Twitter is just a communication tool.** Like the Web, and the phone and the telegram before it, it's just a tool to let one person connect with another.

### **How Does Twitter Work?**

Twitter users--often called Tweeples (or worse)--have 140 characters to answer the question, "What are you doing?" If you join Twitter you can "follow" other tweeples, which causes their updates to appear on your home page. In turn, they can follow you, **a form of permission-based marketing.** You can also direct message them, but always in 140 characters or less.

Twitter communications can be viewed and updated on the Web, through desktop apps, and on mobile devices. Although I use all three methods, I prefer [twhirl](#), a desktop app that has some nice added features and updates my incoming tweets in the background while I work.

A quick peek at some recent posts--called "tweets"--include what people are having for breakfast, vague unease about a job interview and a complaint that raw vegetables make one's mouth "itchy." (Plus a bunch of non-English tweets that may range from the ridiculous to the sublime and back again.)

### **How Does Twitter Help You Work?**

**Within this participating audience of exhibitionists are a growing number of people who are using Twitter for business.** And I'm not just talking about aggressive Web marketers who tweet every blog post they make and create links to all their online activities. (You can create clickable links in tweets, but they have no direct search engine benefits.)

Rather, there are professionals who are using Twitter as a communications tool. (Imagine that!) Here's how *you* might use Twitter for business:

Follow industry leaders who post links to important resources and influence conversations

- Post questions for quick answers and answer others' questions to establish your credibility and expertise
- Create links to your Web site or blog (don't over do it!)
- Keep up on the buzz in your industry
- Network with like-minded people.

### **How to Find (The Right) People on Twitter**

The Twitter search box will search matches in others' profiles, but not in individual tweets. Here are a couple of 3rd party tools that allow for more advanced searches:

- [Who Should I Follow?](#): Finds and suggests like-minded people based on your tweets.
- [Summize](#): Allows you to search tweets for keywords and offers lots of customization tools.

### **How to Get People to Follow You**

The more people who follow you on Twitter, the more influence and networking opportunities you have. Thus, it makes sense to try and build a following. Here are some ideas on getting others to follow you:

- **Follow them.** There's an almost kneejerk reaction to follow people who follow you. However, there's a backlash against people who follow just about everyone for the sole purpose of gaining followers. In short, be discriminating with whom you follow.

- **Post some good tweets right before following someone else.** I find that if someone follows me and they only tweet about how hungry or tired they are, I don't follow them back. The same goes for people who haven't tweeted in a while.
- **Complete your bio.** People rarely follow strangers, so complete your one-line bio and include a URL in the More Info URL section of your profile. I can't tell you the number of times I've not bothered to follow someone because I didn't know a thing about them.
- **Add your Twitter feed to your blog or to other social media profiles.** If you have a following at your blog or a lot of connections at Facebook or LinkedIn, you can leverage this audience to increase your followers at Twitter.
- **Reply to people you are following, especially if they're not yet following you.** That's a good way to engage someone and get them to follow you, even if they didn't follow you immediately. Remember, though, some people have thousands of followers, and may not be able to respond to every reply.

#### **Ideas on Getting the Most Out of Twitter**

While the guidelines of Twitter etiquette are still evolving, guidelines from other social media sites can be used:

- Treat others with respect
- Participate in the community
- Do more than promote your own agenda.

Professionals and consultants have had the most impact at Twitter; most businesses are still trying to figure out how to use Twitter as a communications tool. If you're not a one-person shop, here are a few ideas to help get your creative juices flowing:

- A restaurant tweets their daily specials
- A ticket agency tweets about-to-expire tickets
- A realtor tweets new homes on the market
- A chamber of commerce tweets local events and promotions.

For more ideas, or just to engage me in conversation, [I invite you to follow me at Twitter](#). I promise not to tell you what I had for lunch.

Unless it's really good.

**--Rich Brooks**

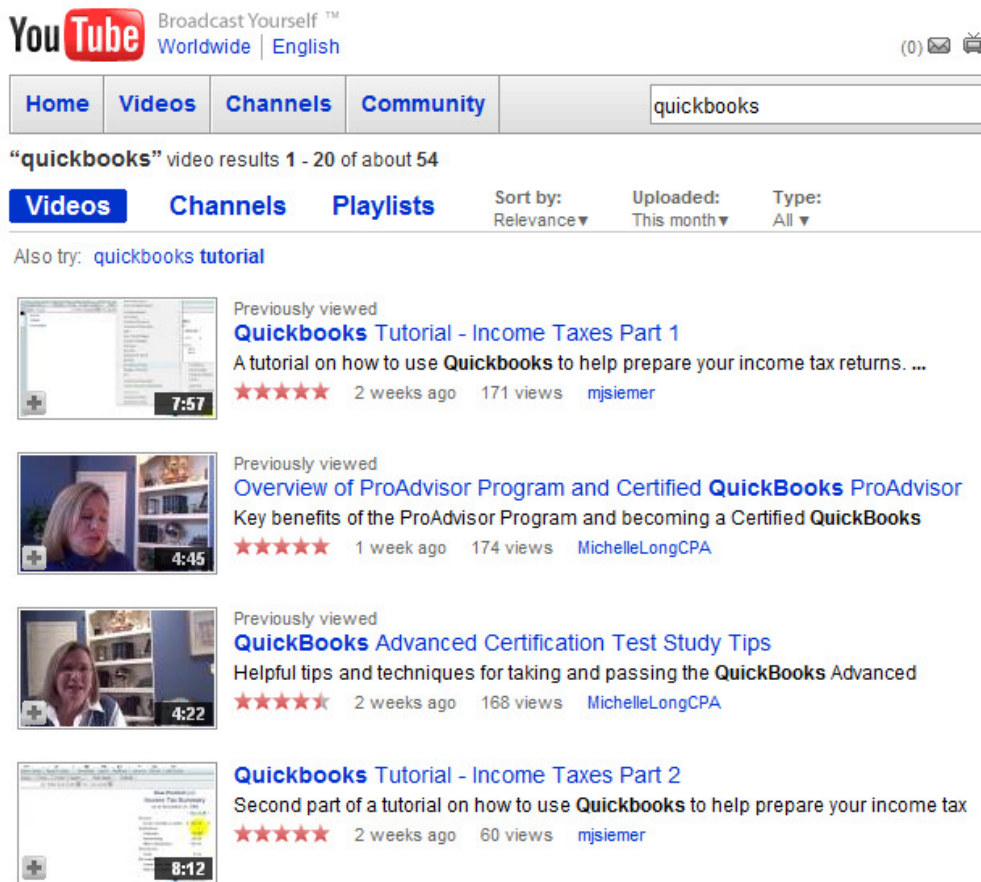
President, flyte new media

[www.flyte.biz](http://www.flyte.biz)

<http://twitter.com/theirchbrooks>

## YouTube or other Video Sharing Sites

Another social media marketing method you may choose to use involves videos. You can create training videos, infomercials for your practice, or educational/informative videos. If you go to YouTube and search for QuickBooks, accounting, or bookkeeping, you'll find a lot of videos!



The screenshot shows the YouTube interface with the search bar containing 'quickbooks'. The navigation tabs include Home, Videos, Channels, and Community. Below the search bar, it indicates '“quickbooks” video results 1 - 20 of about 54'. The 'Videos' tab is selected, and the results are sorted by Relevance. The upload filter is set to 'This month' and the type filter is set to 'All'. A suggestion 'Also try: quickbooks tutorial' is shown. Four video results are listed, each with a thumbnail, a 'Previously viewed' label, a title, a description, a star rating, the upload date, view count, and channel name.

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Worldwide | English (0) [Icons]

Home Videos Channels Community quickbooks

“quickbooks” video results 1 - 20 of about 54

Videos Channels Playlists Sort by: Relevance Uploaded: This month Type: All

Also try: quickbooks tutorial

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Second part of a tutorial on how to use **Quickbooks** to help prepare your income tax  
★★★★★ 2 weeks ago 60 views mjsiemer

Remember to consider your target market and if this would be an effective way to reach them. Also, keep in mind your company image and make sure the video represents your business in an appropriate manner. This can be an effective way to reach a lot of potential clients as well as peers and can help build your reputation and credibility.



## Intuit Community and Other Groups

Another method to build your reputation and connect with potential clients is the Intuit Community and other groups (Yahoo Groups, Google Groups and more). You can contribute your time and knowledge to answer questions and help others while increasing your name recognition and image.

When determining which groups to join, remember to consider your target market and look for groups that they would visit. For example, if you choose to specialize in construction, then you would want to look for some construction industry groups, association discussion boards, or frequent the contractors section of the Intuit Community.

The screenshot shows the Intuit Community website. At the top, the Intuit logo is on the left, and a user greeting "Welcome back, Michelle Long CPA" is on the right, with links for "Edit Profile", "My Q&A", and "Sign Out". Below this is a blue navigation bar with tabs for "Home", "Start & Grow Your Business", "Help With QuickBooks", "For Accountants", and "Intuit.com". A search bar and a dropdown menu for "All Q & A Topics" are also present.

The main content area features three promotional boxes: "Start & Grow Your Small Business" with a right-pointing arrow, "Get Help With QuickBooks" with a right-pointing arrow, and "Community Forums For Accountants" with a right-pointing arrow.

Below these is a "Business Topics" sidebar on the left with categories like "Starting Your Business", "Get Customers", "Manage Money", and "Tax and Business Structure". The main content area is titled "Business Q&A" and has sub-tabs for "Business Q&A", "QuickBooks Q&A", and "Accountants Q&A". It displays a list of questions:

- How many of you are using Facebook to promote your**  
Asked by [chris\\_macomber](#) on 9/16/08 with 51 answers
- What's the best advice you ever got when you started**  
Asked by [beth](#) on 10/6/08 with 27 answers
- Looking for a QB Advisor in the Real Estate Industry** I'd

On the right side, there is an "Ask My Question" section with a dropdown menu set to "Get Customers", a text input field with the placeholder "Get real answers, type here", and a blue "ASK" button.



You should participate in the discussions and forums contributing answers when possible. Whenever you post, you should include a 'signature' below your name which includes the relevant information that you want to share—your company name, website, credentials or whatever you choose. However, you need to make sure that your signature complies with the rules of the group. For example, the Intuit Community doesn't allow you to include links to your website in your signature, but you can include links to your Community profile (which can include a link to your website). Make sure to complete your Community profile (follow the guidelines provided previously for your profile for the Find a ProAdvisor website) including a picture, contact information and details about your business.



 Advanced Certified ProAdvisor  
 Allstar  
 Quickbooks Certified User

## Profile for Michelle Long CPA

<b>Michelle L. Long, CPA,</b> MBA	Line of Business	Professional Consulting
<a href="mailto:QBConsultant@gmail.com">QBConsultant@gmail.com</a>	Address	Lee's Summit, MO United States
Owner		
<b>M. Long Consulting, LLC</b>		

**Michelle Long CPA's Activity**

Questions asked	20
Questions answered	3185
Points earned	5834

**Business Contact Information**

Address	
Phone	(816) 224-7788
Websites	<a href="http://www.MLongConsulting.com">www.MLongConsulting.com</a> <a href="http://www.SuccessfulQuickBooksConsulting.com">www.SuccessfulQuickBooksConsulting.com</a>
Best Way To Contact	Email
Instant Messenger	

**Stories Shared**

**About M. Long Consulting, LLC**

Business Description	QuickBooks Consulting & Training including remote services (Set up, training, trouble-shooting, data file clean up and more) custom training videos, national trainer for Intuit Accountant Trainer/Writer Network, author of "Successful QuickBooks Consulting" and several courses for Intuit, CFO Services and Business Coaching
Years in Business	17
Top Selling Product or Service	QuickBooks Consulting and Training and my book "Successful QuickBooks"

**Michelle Long CPA's Recent Questions**

-  [Overview of ProAdvisor Program and Certification](#)
-  [Disappearing or missing customers](#)
-  [Study tips or techniques to help w/Advanced Cert Test?](#)
-  [Benefits of Remote Access and how to get started?](#)
-  [Accountant's Changes won't import--now what?](#)

**Michelle Long CPA's Recent Answers**

-  [Moving Customer Record From One System to Another](#)

## Reputation as an Expert – Speaking and Writing

A very effective marketing method is to create a reputation as an expert by speaking and writing. Identify topics which will be useful and relevant to your target market. Perhaps there have been new laws or regulations which you can discuss.. You should identify topics which will inform and educate your target market and then you can speak and write about them. Potential avenues for your speaking and writing include:

- Industry associations
- Local Small Business Development Centers (SBDC), SCORE, Women's Business Centers or others organizations
- Local newspapers
- Seminars – live or online webinars
- Online writing – blogs, Community forums and groups, eNewsletters, ezines
- Podcasts
- Being quoted as an expert by others

### Seminars

Seminars can be a great way to connect with new clients and reconnect with existing clients on subjects you know they value. Clients are looking for value and you are looking for clients. Create a valuable seminar by assembling a topical and timely program held at a convenient location with needed take aways. If you have the personality and desire to speak, choose the right topic and provide insight and value while maximizing your time, money and energy.

You may want to offer QuickBooks seminars in conjunction with local groups or organizations (such as the SBDC or SCORE). If you are a ProAdvisor member, there are training materials available for you to use in the Train Your Clients section of the ProAdvisor website.

### Webinars or Podcasts

Taking your seminar (or brief messages for a Podcast) on-line can be an effective way to reach more people than you can individually. This tactic is gaining momentum. Your information is archived and available for the very busy entrepreneur who will eventually take the time to learn but on his own time.

## Blogging

Writing a blog is a great, easy way to share your knowledge and information with others while enhancing your reputation and credibility if it is done well. You can get started blogging in 15 minutes with Blogger.com (part of Google) or get more sophisticated with TypePad or WordPress. You can write articles, post Q&A, share tips and tricks, or write about updates or news to share.

Here is my blog using blogger—please visit it at [QBConsultant.blogspot.com](http://QBConsultant.blogspot.com)

The screenshot shows a Blogger blog post. The header is dark blue with the title "Successful QuickBooks Consulting and QuickBooks Tips" in white. Below the header is a light blue box with a paragraph of text: "This blog is for QuickBooks users and accounting professionals who support them. It will allow me to share QuickBook tips, tricks, news and updates. I'll also discuss best practices and ideas to help grow your business including effective marketing ideas, utilizing remote access and new technology and other topics! Anything that I think will be useful and relevant for you! I appreciate your comments, feedback and suggestions!"

The main content area has a light green background. At the top left, it says "SATURDAY, JANUARY 24, 2009". The post title is "New for QuickBooks 2009 -- Duplicate Transactions". The text of the post reads: "There were several new features for QuickBooks 2009, but one that many people overlooked is the ability to duplicate transactions. This will be especially great when you have the same invoice for many (or all) customers such as a home owner's association or need to issue checks for the same amount to numerous vendors or whatever. After you create the first transaction, you simply right click on it (or Edit on the menu bar) and select Duplicate. Then, you can change the name or whatever else before you create the next one! Don't forget you can also memorize transactions (Control+M or Edit>Memorize) to recur automatically too! I hope that helps save some time for you or your clients! ;-)"

At the bottom of the post, it says "Posted by MichelleLongCPA at 4:36 AM" and "0 comments". There are also icons for social media and a pencil icon. The labels are "QuickBooks Tips".

On the right side, there is an "About Me" section with a profile picture of Michelle Long CPA and a short bio: "I'm the author of the book 'Successful QuickBooks Consulting' and as owner of M. Long Consulting, LLC, I specialize in QuickBooks consulting and training, CFO services, and helping others start and grow their own business! I'm a national speaker for Intuit (the company that makes QuickBooks) and I've presented numerous seminars at conferences for accounting professionals. I've written..."

When asked about blogging, Jason Rosen, owner of Rosen Professional Services in New York city stated:

"Along with our website, we have a blog called "Balancing Act." There have been multiple benefits from posting to the blog.

The first benefit, is that the blog has attracted approximately 2,000 unique visitors per month. For a small firm like ours those are huge numbers. Additionally the blog has been helpful in communicating with our clients. This is particularly true with topics that may not always be addressed in client meetings.

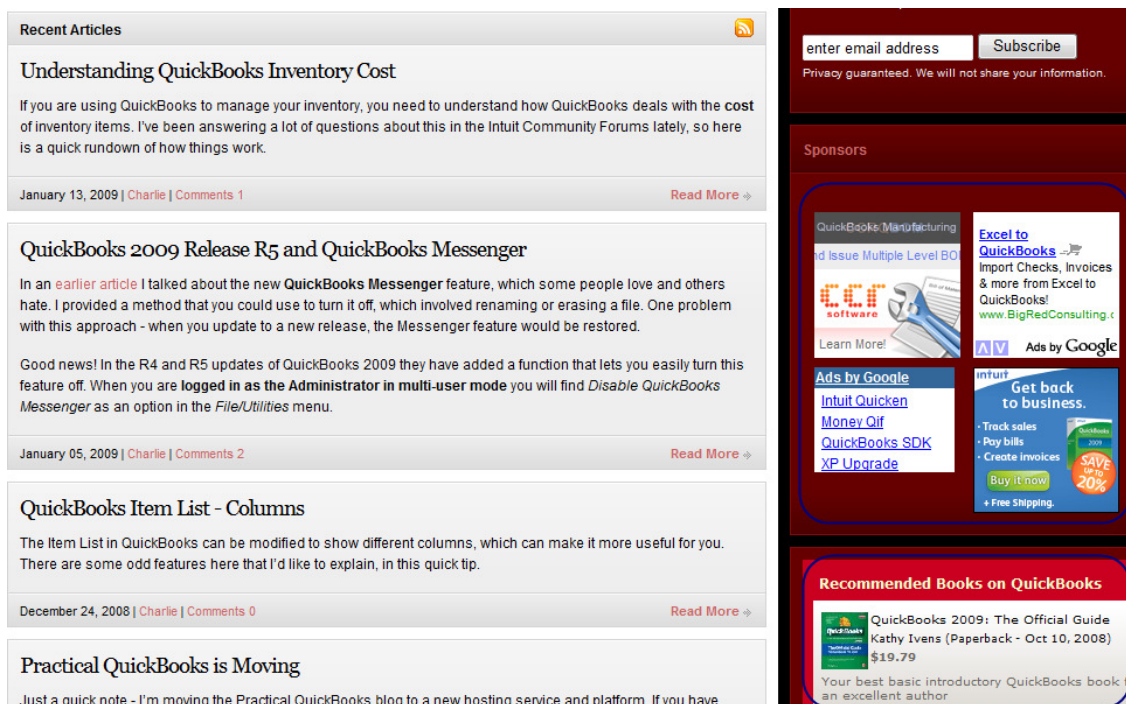
We have also been able to use Balancing Act to help promote events for our clients. This is a huge value add for some of our clients that are looking for additional exposure.

We have found that Balancing Act has been a great way to emphasize value."

Charlie Russell, owner of CCRSoftware has a much more sophisticated blog and he is also very active in the Intuit Community (CCRussell). Charlie indicated that he previously used TypePad for his blog, but he has switched to WordPress which affords him more control over the site. Charlie recommends [www.problogger.net](http://www.problogger.net) as a good source of information about blogging. This is the main page of his blog:



Charlie's Practical QuickBooks blog also includes affiliate links (Intuit Affiliate program and Amazon), Google AdSense ads (discussed below) which are content related as well as a link to his website – [www.ccrsoftware.com](http://www.ccrsoftware.com). Charlie has done a good, tasteful job of keeping the ads and links small and relatively few. This can be a source of additional revenue, but it is important to avoid overdoing it—keep your company image in mind at all times.



## *Google AdWords and AdSense: A Dynamic Small Business Marketing – by John Jantsch*

Unless you have been living under a rock for the last year or so, you probably know that Google has become the king of the search engine hill. There are many reasons for this, but number one in my opinion is that above all else they put value on content. Today, I want to introduce you to two very powerful small business advertising options created by Google.

These two ingenious programs have all but revolutionized the way advertising is done on the web. Warning: If you are thinking..."web advertising isn't for me, I just need a few more clients around the block"...you better read this or be prepared to have your competitors eat your lunch.

Google AdSense - Again content is king at Google. This program allows web site "publishers" to add some code from Google and receive "content relevant" ads on their site from other site owners. Here is an example - those ads in the box on the right of the page are delivered by Google and are matched to the content on the page. When someone surfs to the page and decides to check out one of those ads, the web site owner earns a portion of the advertising revenue that Google collects.

The key here is that if you go to a site about quilting, you will see ads about quilting and not about dog grooming. I know this sounds so obvious but Google was the first to really figure this out.

This program has worked so well that some website owners are actually building content specific sites and paying for them solely through AdSense revenue. Small business owners should consider adding this feature to pages on their site for several reasons.

I've already mentioned the fact that there is money to be made, but what many site owners are finding is that because Google is so respected and because the ads are highly targeted...they are no longer looked at by surfers as ads, they are looked at as content.

Some will even go as far as to say that by putting the Google ads on your site you actually better your chances of higher rankings with Google. Google flatly denies this claim and I don't think it is true but I do know that Google AdSense ads should be on every small business owner's site. (Google AdSense)

*John Jantsch is a veteran marketing coach, award winning blogger and author of Duct Tape Marketing: The World's Most Practical Small Business Marketing Guide published by Thomas Nelson - due out in the fall of 2006.*

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## *Blog and Ping – by John Jantsch*

There are many very good reasons for setting up a blog for your business, but immediate search engine traffic is one of the best

Everyone is talking about blogs these days as the magic money-making marketing tool. Some of the hype may actually be true, but I suggest you cut through most of what you read about blogs just long enough to understand why every business needs a blog.

Right now, that's not to say this won't change, search engines are in love with real blogs. By real blogs I mean blogs that are set-up and run by businesses that offer useful content on them. Like every successful marketing method there are people out there setting up fake blogs and dumping garbage, but keyword rich, content into them in order to trick the search engines into ranking the content highly. [Please resist the urge to add to this form of search engine spam as it may actually get you banned by a search engine.]

When you understand a little about how blog software works, you get a better understanding about why search engines love blogs. Here are the top reasons that business blogs and search engines go hand in hand.

### **Lots of Pages**

Each blog entry is shown in chronological order on a blog's homepage, but each entry is in reality its own web page, with its own unique URL and title. So, an active blogger can create hundreds of keyword rich web pages in a matter of months.

### **Change Is Good**

In order to claim your place at the blogging table, you must commit to making posts often—4 or 5 times a week perhaps. This commitment means that you are creating, updating and changing some portion of your site several times a week. The typical small business web site is lucky to receive an update several times a year. Search engines like change.

### **Wake Up Call**

Because search engines love content that changes, they are ever ready to visit a site when it is updated. One feature unique to blog software is something called a pinging. Basically, what you are doing is sending out a message to various blog directories to come and visit your site because it has been updated. Once a search engine has located your site, this is like a personal invitation to come back and get the new stuff. I use a site called Ping-O-Matic to send pings to multiple services. Some blog software can be configured to do this automatically.

### **RSS Directories**

Blogs also have a built in distribution method known as RSS. This allows you to push your updated content out to people who subscribe through an RSS reader such as Bloglines or FeedDemon as well as Yahoo and MSN. This ability allows you to communicate directly with subscribers, but it can also help get your main site noticed and indexed by the major search engines. Yahoo, for example, allows people (including you) to subscribe to your blog's RSS feed. On the day you create your blog, you can subscribe to it via a free MyYahoo account, and Yahoo will visit and index your blog for free. It has no choice.

### **Linking Is Key**

Part of the blogging culture is the predisposition to link to and from quality content that relates to the subject you are blogging about. In other words, bloggers like to link. Links from other high quality blogs will send traffic and get your blog and web site noticed.

So, your blog marketing strategy goes a little like this: Set-up a blog and start posting. Ping each time you make a new entry. Submit your blog to the major blog and RSS directories. Start looking for link partners. Repeat

In the last few weeks, I have set-up blogs for an attorney, a label manufacturer, and a remodeling contractor. In each case, the blogs were indexed and spidered by the major search engines within 48 hours.

Traffic to the main web sites for these businesses (although a bit meager to start with) has already doubled or tripled. Traffic from each of the major search engines is now showing up for a large number of search terms and phrases.

Who knows how long this blog traffic bonanza will last, but at this moment, a blog has never made more sense.

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## *Bloggging for Business – Powered by TypePad*

### **What is a blog?**

"Blog" is short for "weblog"—a website that's used to chronologically log a discussion between a blog writer (a "blogger") and their readers. Blogs are dynamic in nature, creating a conversation between the author and the audience through frequent exchanges. And content like text, images, videos and links can be added by both.

Blogs are a safe, easy way to share information, gather feedback and generate fresh and relevant news

*"You cannot afford to close your eyes to [blogs], because they're simply the most explosive outbreak in the information world since the Internet itself. And they're going to shake up just about every business - including yours. Blogs are a phenomenon that you cannot ignore, postpone, or delegate. Given the changes barreling down upon us, blogs are not a business elective. They're a prerequisite."*

- Business Week

### **Bloggging is good for business.**

Bloggging is a **simple, low cost solution for staking out a claim on the Internet and connecting to your customers**. Best of all, it gets results. More and more companies consider them to be an essential part of their marketing strategy.

- **Create an inexpensive online presence.** Blogs are a quick, easy and low-cost alternative to a traditional website. They're especially handy for small business owners who may not have a large budget or technical know-how.
- **Generate traffic and drive more sales.** Blogs create a strong two-way connection with your customers. You can collect feedback directly from them and stay on top of what they want.
- **Distinguish yourself from larger competitors.** This more personal online presence helps your company develop a more "human" voice, and forge a stronger connection with customers. It's powerful way for a small or medium-sized business to stand out in a crowded marketplace.
- **Build stronger customer relationships.** Create a 1:1 dialogue with potential customers. Blogs build a bond with customers by proving that you're interested in what they have to say.
- **Rank high in search engines.** Search engines prefer frequently updated, well constructed web pages and content. Frequent updates help ensure that search engines add your content to their search index, allowing more customers to find your business.
- **Share your enthusiasm.** A blog shouldn't be used to just sell or push a product. Instead, blogs are an effective way to share your enthusiasm and passion for your business with a broader range of customers.
- **Generate buzz.** Talk about what's happening in your business. Promote an upcoming product or trade show. Or use the forum to respond to comments and questions from your readers.
- **Test ideas and products.** Because blogs encourage conversations, people can easily comment on their experience with your product or service. They can share valuable ideas, and ask questions while allowing you to gather their input as research.

### **Blog your way to success in 5 easy steps:**

1. **Select a service.** Nearly every service offers a free trial and is extremely inexpensive to start, so you can experiment and find the best fit for your company.  
Services like TypePad include:
  - Exclusive features that help you add functionality to your web pages without programming.
  - Automatic delivery of your blog posts directly to search engines.
  - Access to professional support team 365 days.
  - A robust community of other professionals.
2. **Get started with your blog.** Setting up your blog only takes a few minutes. You can even have your blog hidden behind a password while you start out, so you can experiment without



anyone seeing your "work in progress." Just pick a design, decide which topics you want to focus on, and go!

3. **Write your first post.** Start by writing short posts about subjects that you cover in a newsletter, direct mail promotion, or in an email—the content might be of more value to a larger audience. Or just answer the same questions asked by a new business contact: What does your company do? What makes it different from other others in the field? Why are you passionate about the work that you do?

Tips to get you writing:

- You don't need to write everyday, only as often as you have something to say. Start by writing 2-3X a week to help the content stay fresh.
  - Don't be shy about reusing the material you write for newsletters or emails.
  - Above all, let your personality shine through. Give it your unique voice.
  - As with all other business communication, don't write anything that you wouldn't want to appear in public.
4. **Publicize your blog.** After you launch your blog, services like TypePad and others will make sure search engines know about it. Also put your blog's address in the signature of your email messages, link to it from your existing company website, include the address in the bottom of print promotions, and mention it to customers on the phone or by mail.
  5. **Secure a domain name—or don't.** If you haven't registered a domain name for your company, relax. Your blog's domain name (typepad.your blogname.com) will work for now. Later, you can buy a domain name like (yourwebsitename.com), from any provider you choose.

## *10 Essential Blogging Tools – by John Jantsch*

### **Add these tools to grow your blog readership**

So, you finally decided to take the blog leap. You've heard all about the marketing and search benefits so you stepped up to the plate and signed up for a TypePad, MovableType or WordPress blog software package. Now you're a blogger.

Okay, now what? Add the ten essential blogging tools listed below and you will be well on your way to creating and promoting a blog that is also a powerful marketing tool. I'll explain the use of the tool and offer some suggestions, including the tools I use on my own blogs.

#### **Feed reader**

The best way to learn about blogs and blogging is to read or at least scan lots of blogs. One of the wonders of blogs is that you can have every new post from every blog you want to read delivered to your desktop or to an online location so you can easily read and scan the posts of many blogs in a very short time. Newsgater is a good online choice and also has a version that integrates with Outlook. I use a free online service know as Bloglines.

#### **Subscriber center**

You need to make it easy for your blog visitors to subscribe to your blog's RSS feed – so they can read your blog in their favorite feed reader. The best way to do this is to go to FeedBurner and burn your own RSS feed and use the tools they provide to set up automatic subscriber links so people who want to use Bloglines, Google Reader, MyYahoo or Pluck, for instance can click on one button to subscribe. Tech types can figure this out without the buttons but why not make it easy for anyone to figure out.

Side note – subscribe to each of these yourself and you will force some blog spiders to visit your site.

#### **Email subscription option**

A lot of people will never get the whole feed thing, but everyone gets email. Create a way for people to subscribe by giving you their email address – they will simply receive your blog posts like an email message. FeedBurner offers this service for free. FeedBlitz is another option or, if you already have an autoresponder email list service they may offer this service. AWeber offers this and helps me integrate these blog email subscribers into my other mailing lists.

#### **Blog and RSS directories**

There are hundreds of blog and RSS directories, and getting listed in many can be a good thing. I use a piece of software called RSS Submit, but you can also visit Robin Goode's frequently updated list and submit your blog and feed by hand.

Hint: subscribe to the RSS feed he offers, and you will be notified when new directories are added.

#### **Ping service**

Pinging is a term used for letting the various blog and RSS directories know when you have posted new content. Again, FeedBurner offers this as an automatic option called PingShot, and you should activate it. PingGoat and Ping O Matic are other options, but they require that you visit and update your record each time you post new content.

#### **Bookmark manager**

As you surf around the web or hop from blog to blog, you may find sites that you want to point out to your readers. Online bookmark managers allow you to bookmark and categorize web and blog pages as you collect them and are a great tool for managing all of the stuff you find on the web. I use del.icio.us but BlinkList does a fine job as well.

#### **Blog stats**

I like to track a few key stats in real time because it shows what other blogs might be linking to you or posting about your blog. A lot of people just like to track this kind of thing for fun and frequently visit sites like Technorati. I like to track it for networking opportunities. I use a tool called MyBlogLog because it allows me to see where traffic is coming from but also tracks what links on my blog visitors are clicking on. It's amazing how this data can help you write more effectively.

#### **Desktop posting**

With most blog software you must go online and post using a set of tools provided by the blog software. Many bloggers like to use a desktop application to create and submit their posts as it gives them some extra tools and allows them to more easily integrate content and files on their computer.

I use w.blogger but also like Performancing, Qumana and ecto (apple folks).

### **Tell a friend script**

My blog software has a feature that allows a reader to click and link and send the post to a friend. This tactic brings me lots of readers. You might try looking here for some simple scripts that do the same <http://www.javascriptkit.com/script/script2/tellafriend.shtml>  
[http://www.stadtaus.com/en/php\\_scripts/tell\\_a\\_friend\\_script/](http://www.stadtaus.com/en/php_scripts/tell_a_friend_script/)

### **Republish feed headlines**

The ability to republish your blog posts on other web page, sites you own or sites of strategic partners is a great way to expose folks to your blog content. One more time, we turn to FeedBurner for a painless way to republish your blog post to any web page you choose with something they call BuzzBoost.

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## *Creating an eNewsletter*

### **Fundamentals**

- Who is your target? (No wishful thinking here. You must have a target in order to assemble your mailing list)
- Who will lead the project? (You need someone who can handle format, content, and mailing details)
- Do you need a server side or client side list manager to mail, handle additions and omissions to your mailing list? (This can be cumbersome. Think hard about outsourcing to the pros)
- How frequently does your target want to see an electronic newsletter? (Ask them but orient your question toward what is feasible with resources. Monthly and quarterly are much easier to manage.)
- Once the frequency is determined and announced, stick to it. (Don't decrease any credibility gained via the e-zine by not following through).
- Will you need to also supplement the electronic copy with a print copy? (Is it okay to cater to the on-line community with electronic only or can you send a less frequent print copy to customers?)
- Do you want to accept advertising? (Many e-zine publishers don't start until they have 1000 readers.)
- Are you going to use the e-zine as a soft sell between the lines or as a hard sell? (It is a marketing tool but remember to keep products in theme.)
- Is it opt-in or opt-out? (Must visitors to your site sign up to receive it or do you have a mailing list already prepared which you cull down as people opt-out?)
- If opt-out, be sure to include a way for people to do so and honor the request promptly.
- Do you want to list your e-zine with e-zine directories? (It's inexpensive and content providers can find you more easily if you plan to outsource content)

### **Format**

- Do you want it to go directly into client e-mail or must they click on a link to open? (The first is technically an e-zine, the second is a webzine. The more the client work must work to get info, the less likely they will read)
- Do you want the customer to click into another page to access articles or scroll down the same page via navigation? (Personal preference plays a part here)
- Are your graphics similar to those already used within your organization or slightly different? (Consistency versus new and different)
- Are you limiting line lengths? (Limit characters to 60–65 characters or shorter with a hard return or you could have a mess)
- Are you designing the format with the web in mind? (Use white space since reading on-line can be hard on the eyes.)

### **Content**

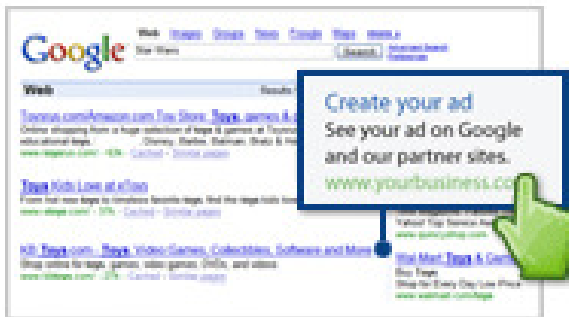
- Do you in-source or outsource the content provider(s)? (Unless you can write it, manage the content providers and or have management support for folks you don't manage, consider outsourcing if you have the budget.)
- Do you have set of objectives that help establish content rules? (Determine your objectives, content categories, number of articles, article length, and preferred vantage point)
- If ads are accepted, determine where they will be placed. (Delicate balance between exposures the advertiser is playing for and interrupting content flow. The more ads, the less likely the e-zine will be read)
- Scan for articles you like in other e-zines. (Consider requesting replication rights. Not all articles need be fresh)
- Insure author's name is attached so you can evaluate their value for more articles.

## Other Advertising Tactics – Google Ad Words – Pay Per Click

Google Ad Words are a marketing method to help your ad show up in search results based on key words you specify. You only pay when someone clicks on your ad—ie Pay Per Click. You are able to target your ad based on content or a local or regional area. Google provides you with Placement and Performance reports to help you determine the effectiveness of your ads. You can specify a daily budget so that you can control the cost.



*Keywords* are what people search for on Google.



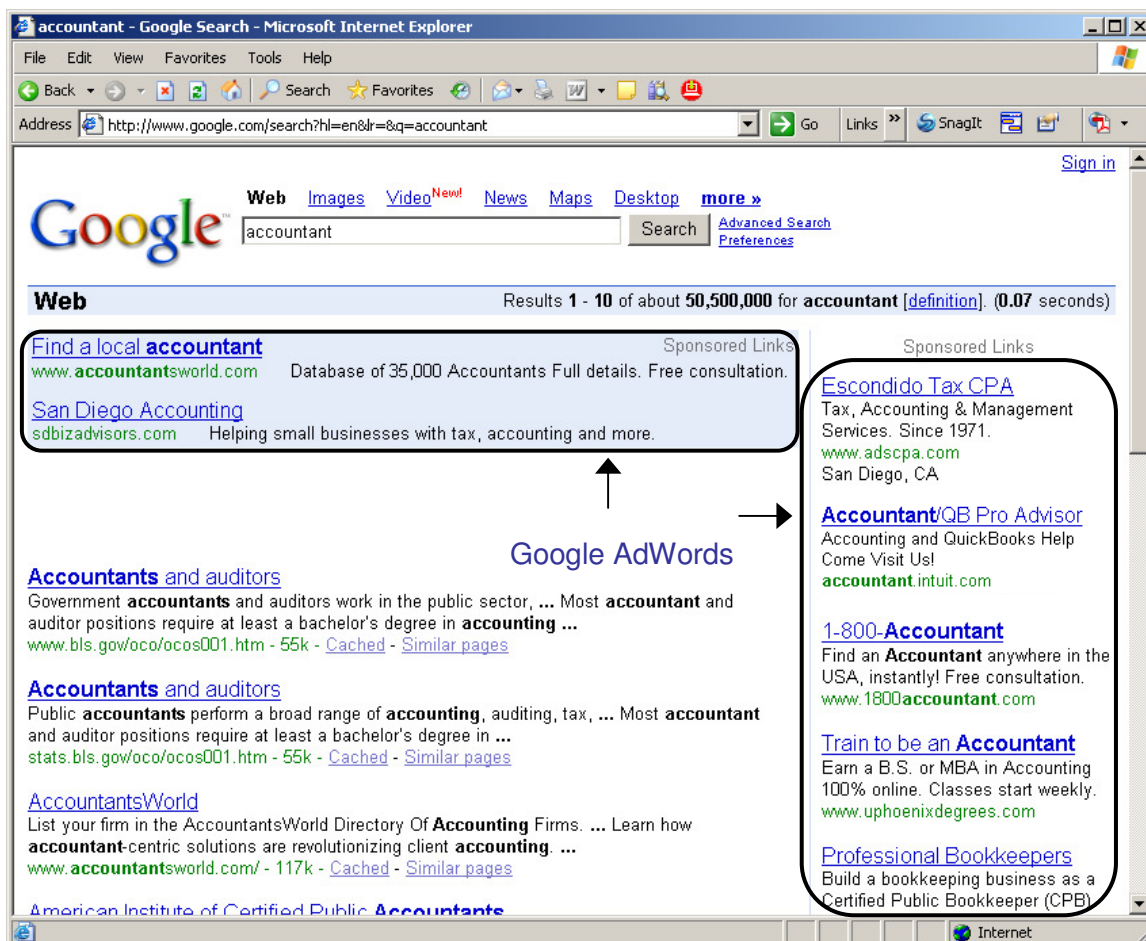
Your *ad* appears beside relevant search results.

## Google Marketing Tools White Paper: Google AdWords®



### Google AdWords®

Google AdWords® is a system that allows you to place your advertisement on Google search results pages. This allows you to target specific potential customers that are already searching for products or services that you provide. For example, if you are an accountant and someone searches for “accountant” in Google, your ad can be displayed along with the search results, providing more visibility for your business.



Google AdWords® gives you total control of your Google advertising campaign, including what your ads say, the geographic locations and service areas in which your ads appear, and your budget and spend levels. Your budget can be changed at any time. You can update your campaigns and change their messaging as often as needed. You can start, pause, stop and resume your advertising whenever you like. With Google AdWords®, you are only charged when someone clicks your ad, not every time it’s displayed. The cost-per-click pricing starts as low as 1 cent and goes up to whatever you feel comfortable spending.

Keyword-targeted ads are ranked on search result pages based on their maximum cost-per-click (CPC) and Quality Score on Google.com. You set the maximum cost-per-click that you’re comfortable paying. The Quality Score is determined by the keyword’s performance history on Google: its click-through rate (CTR), relevance of ad text, historical keyword performance, landing page quality, and other relevancy factors.

Google AdWords allows you to specify what search terms will trigger your ad to display.

For example, if you own a consulting business, you can include “QuickBooks consulting” and “QuickBooks trouble-shooting” in your description. You can also include “financial reporting”, “job

costing”, and other terms to get your ad to display as much as possible. \*\*\*Please review the Search Engine Advertising Policy below .

### **Google AdWords® FAQ**

- *Are there any other fees associated with Google AdWords?*  
**There is a \$5.00 activation fee to begin using AdWords.**
- *Is there a minimum amount to spend on Google AdWords?*  
**There is no minimum that you are required to spend. You set your own budget and the maximum amount you are willing to pay per click (cost-per-click). These amounts can be changed at any time to fit your changing business needs.**
- *How can I make my ad appear more often on search result pages?*  
**The ad’s display frequency is determined by the maximum cost-per-click that you set, as well as the quality score. If you raise the maximum cost-per-click, then that will affect your ad’s frequency. The quality score is affected by the relevance of your ad to what is being searched. Therefore, if you include more keywords, that will also affect the ad’s frequency.**

For more information on Google AdWords, go to <http://adwords.google.com/support>

### **\*\*\* Search Engine Advertising Policy – QuickBooks ProAdvisor Program**

NOTE: Intuit may revise this policy at any time, and may change the Membership Terms and Conditions to specifically restrict or prohibit the use of the “QuickBooks®” or “ProAdvisor®” brands in search engine advertising. Intuit reserves the right to demand that any search engine or similar site, or any member of the ProAdvisor program, stop or remove keyword or adword advertising triggered by any Intuit-owned trademark if Intuit believes that its trademarks are being misused.

Currently, it is Intuit’s policy to allow ProAdvisor members in good standing the limited ability to purchase search engine advertising using Intuit’s “QuickBooks” and “ProAdvisor” brand names solely as a keywords or adwords to trigger sponsored ad results, as long as all of the following conditions are met:

1. ProAdvisor members may only use “QuickBooks” or “ProAdvisor” to trigger search engine advertising for their own bookkeeping, accounting and consulting services, and for no other services or for products;
2. Under no circumstances may ProAdvisor members use “QuickBooks” or “ProAdvisor” in the titles of their sponsored ads;
3. Under no circumstances may ProAdvisor members use “QuickBooks” or “ProAdvisor” in the URL used in their sponsored ads;
4. All other text of a sponsored ad must be completely truthful, clear and accurate as to the nature of the relationship between the ProAdvisor member and Intuit, and must not misrepresent the ProAdvisor member or their services. Sponsored ads cannot contain any language that falsely states or implies official endorsement, sponsorship or other preferred relationship with Intuit or QuickBooks except as expressly provided in the ProAdvisor and Certified ProAdvisor program terms and conditions and their restrictions on advertising and marketing.
5. ProAdvisor members must continue to abide by all other terms and conditions of the ProAdvisor and Certified ProAdvisor programs regarding use of Intuit’s trademarks, service marks, logos, brands and domain names.

## Other Advertising Tactics – Creating a Targeted List of Potential Clients

If you want a mailing list or contact list of potential customers, you do not have to pay a lot of money to buy it. You can create your own list for FREE! Many public libraries subscribe to a database called ReferenceUSA which you can usually access for free with a library card (often from home when you log in through the library website).

ReferenceUSA allows you to search for business or residential listings based on the search criteria you want to specify. It is really important that you know what your target market is so you can create a list based on that criteria. For example:

- Do you want a list of residential customers in a certain neighborhood to send a post card about tax preparation services to? You can get a list of all home addresses within X distance of a given address. You can also specify median home values or median income levels as search criteria.
- Do you want a list of all contractors, with 3 or more employees located in a certain city?

You can specify the search criteria you want based on the target market you are trying to reach. If you need help, ask the reference librarian for help.

Here is the screen to enter the search criteria for residential listings (ie individuals):

ReferenceUSA  
An infoUSA Company

800.808.11

Version 2009.1 US Residential Home About Us Our Quality Contact Us

Quick Search Custom Search

Select one or more criteria and click "Create Search."

**Name**  Last Name  First Name  
 Middle Initial

**Phone**  Phone Number

**Geography**  Address  ZIP Code  
 Area Code  City, State  
 MSA (Metro Area), State  State  
 County, State

**Special Selects**  Median Home Value  Median Home Income

Create Search Clear Search

50 Prints/Downloads per Search

Since this is the free version, you can only download 50 contacts at a time. You can make a note of where you finished the last download, go out and start a new search to continue downloading your list. You can download the contact list to a CSV file which you can use to print labels or do a mail merge in Word.



You have more options when you are searching for a business as shown in the following image:

**Quick Search** **Custom Search** **Guided Search**

Select one or more criteria and click "Create Search."

**Name**

- Company Name
- Executive Name
- Brands and Products

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**Business Type**

- Yellow Page Heading or SIC
- NAICS - 2007
- Primary SIC
- Major Industry Group

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**Geography**

- Street Address
- MSA (Metro Area), State
- ZIP Code
- City, State
- State
- County, State
- Radius

---

**Phone**

- Business Phone
- Area Code
- 800 Numbers

---

**Business Size**

- Employees
- Sales Volume

---

**Ownership**

- Public Companies/Stock Exchange
- Home-Based Business
- Foreign Parent
- Headquarters/Branch

---

**Special Selects**

- Executive Title
- Ticker Symbol
- Executive Gender
- Years in Database/Yellow Page Ad Size
- Government Offices
- Web Address
- Year Established
- Fortune 1000 Companies
- Number of Personal Computers
- SQ. Footage

**Create Search** **Clear Search**

## Other Advertising Tactics

Advertising includes some of the most well-known tactics when people think about marketing. Do these sound familiar? Review the tools on the following pages to see how you can develop these tactics to your advantage.

**Flyers** – Creating a valuable flyer requires thoughtful planning, simple content and impressive design. The flyer should be solid, simple and clean. Include what, where, when, why, what time, how to get there and your call to action. It's important not to overwhelm. Pare the words down and give the reader just enough to achieve your call to action.

**Brochures** – If you are a serious professional who wants to expand the business, you need something to remind people of what you offer. A brochure sends a message of professionalism. It has many functions – as a business development tool, an educational device, a reminder of services and a leave-behind. With current technology, you can craft one yourself!

**Postcards** – They have immediacy, instant visibility and flexibility. They are less expensive than letters and only compete with that day's mail. Postcards can be used for branding by using the same front image as your consistent message and altering the back with your preferred message.

**Magnetic or window decals** – This simple and inexpensive tactic creates visibility in your local market. Make sure the decal is classy, unobtrusive and informative. It should fit with your image and brand. It should also be removable!

**Letters** – Engagement letters are a critical introductory piece in your marketing arsenal. A well-crafted letter can get your foot in the door, define expectations and draft the customer relationship. It shows your philosophy, your image and the benefits you can provide the client.

**Print ads** – Think about frequency, design, placement and evaluation. Advertising can be expensive and ineffective if the print strategy looks at less than all four parts. It's easy to burn money. Developing a winning ad takes planning, realistic expectations and flawless execution.

**Radio ads** – Taking part in a collaborative with other service providers is the key to using radio. It can be an expensive medium for the single provider. Radio requires professional assistance for design, production and placement.

**Yellow Pages** – According to the Yellow Pages Association, the yellow pages reach 76% of American adults in the average month. The average business gets \$6 in profit for every \$1 invested. That's a compelling reason to advertise!! Of course an eye-catching ad and knowing the rules of this medium's page design helps. Add photography, make it big and set yourself as the trusted source in your content.

## *Checklist: Avoid These Mistakes When Developing a Flyer*

Courtesy of Bridget Pilcher, President of **BC Design**

### **Five Planning Mistakes**

- Develop from scratch – Find something you like to start from instead.
- Forget the point – Don't under develop your message – remember your objective!
- No theme or creation of visual interest – Think about what makes people look at flyers.
- Mixed message for placement – Determine where & when the flyer will be distributed – on community bulletin boards, libraries, campuses?
- Forget your audience – Ouch!

### **Five Content Mistakes**

- Concentrate on features versus benefits
- Use overused and turn – off language such as “Call Today!”
- Use long and complex sentences – Instead, go with bullets. Be clear and concise.
- Too much text – Skip the qualifiers
- Tone – No more fear, uncertainty and doubt!

### **Ten Design Mistakes**

- Fragmented – Keep a nice flow, solid and simple. Lots of impact. Keep to strong and crisp logos & fonts.
- No white space – “White space is very attractive but people fight it.” Keep it clean. Use space wisely.
- Size – Vary the size, i.e. bullet check points with first bullet extra large
- Emphasis – Underlining is out, italicizing is in.
- Forget copying – Need to think with a Black and White mindset.
- Suboptimal placement of content – The eye travels from top left.
- Fonts – Three or less rule, serif easier is to read. Don't use sans serif for large amounts of text. Use old Garamond, the basic Helveticas & dingbat for bullets. Always include something of visual interest.
- Graphics/color – Use boxes and borders minimally and only if it fits the image you want to convey.
- Photos – Watch how they will copy. Instead of using a color photo which can copy badly, use a black and white.
- Balance readability and personality

## ***Checklist: Developing a Brochure***

Courtesy of Bridget Pilcher, President of **BC Design**

### **Why Do I Need A Brochure? It's ...**

- A business development tool
- An educational device
- A reminder of services

### **What Should I Say?**

- What must be said?
- What about your business will potential clients find unique?
- What would be nice to say if you had room?
- Make it short and sweet.
- Give an accurate and high level view of your products and services.
- Include a call to action

### **How Should I Say It?**

- Sentences of varied length
- Bullets where appropriate
- Two or three fonts
- A professional color scheme
- White space so it doesn't look too crowded
- Active versus passive words

## ***Checklist: List of 5 Postcard “Need-to-Knows”***

### **Define**

- What do you hope to achieve with the postcard?
- Are you simply creating awareness that you exist, piquing their interest about your services or offering a discount to incite them to call you?
- Who will receive your mailer and where will you obtain your mailing list?

### **Design**

- Postcards should be bright and bold
- Create succinct message points
- Have plenty of white space so they are readable.
- Print on heavier stock or they may get lost in other catalogs.

### **Preferred Size**

- Pick a size that works for you.
- The official United Postal Services (USPS) postcard size is 4.25” x 6”.
- Oversize & jumbo postcards are hard to miss! If done properly and presorted, the larger size postcards can be mailed for under \$.20 apiece. The maximum size is 6 1/8” x 11 1/2”.

### **Mailing**

- Get up to speed on postal regulations on proper design and mailing techniques.
- To bulk mail, you will need a permit
- Hire a graphics professional for design and a mailing house to distribute your postcard.

### **Spacing and Barcodes**

- Critical for mailing
- Contact a professional or your post office for tools which can assist you in doing this correctly



**Time to Get Your Financial Records In Order?**



XXX Bookkeeping  
500 Main Street Anytown USA 55555

Place  
Stamp  
..

**It's Tax Time.  
Let us help you.**

- Use Your QuickBooks Software Effectively
- Get Your Books In Order
- Save Valuable Time Productivity

**Call Us For A Free Consultation.**

Number One Customer  
Jacks' Repair Shop  
444 1<sup>st</sup> Street  
Anytown, USA 55555



**Checklist: Create a Great Yellow Pages Ad**

Courtesy of Edward O'Keefe, President of **Professional Advertising**

**What Prospects Want?**

- The most qualified professional they can afford to hire.
- Whether or not you provide the specific services they need.
- A company they can trust and rely on.

**How Do You Get That First Call?**

- Photography
- Ad size
- Content

**How Does One Create a Great Ad?**

- The graphic pulls the reader's eye directly to your ad. The first ad seen is the first ad called over 50% of the time.
- The graphic helps to tell the story and it matches the headline.
- The headline identifies the service your prospects want.
- The prospect is reading for information. If they don't find what they want they will assume that you don't do it and they will call someone who does list it. So don't you assume anything.
- An ad with certifications gives you credibility.
- The ad is friendly and approachable. Never underestimate the power of a smile.
- The ad is clean and easy to read and understand.
- The ad offers a free consultation.
- The combination of factors adds up to a professional image that you can trust. And trust is absolutely what you want and need.

Sample Yellow Pages Ads



### Certified Public Accountants

- Bookkeeping & Payroll
- Tax Preparation
- Audit Protection
- Financial Audits
- Planning & Budgeting
- IRS Representation
- Financial Statements
- Business Valuations
- Acquisitions & Mergers
- 401K Planning

- \* Certified QuickBooks ProAdvisor®
- \* Non Profits, LLC, Inc., S-Corp, Sole Proprietorships
- \* New Start-ups
- Government Contracting
- \* 25 Years Experience

*Free Consultation*  
**CERTIFIED ACCOUNTING**  
**703-555-5555**  
23 Main St., Arlington  
[www.AccountantNow.coo](http://www.AccountantNow.coo)

**L — J — , CPA**  
IRS Tax Specialist  
20 Years Experience



### Bookkeeping



### Payroll & Taxes

Certified QuickBooks ProAdvisor®

- ✓ Financial Statements
- ✓ Budgeting & Planning
- ✓ Taxes & IRS Help
- ✓ A/R, A/P, Balance Sheet

15 Years Experience  
**FREE Consultation**  
Advanced Bookkeeping  
**703-555-5555**



## ***Checklist: Avoid 10 Mistakes When Publishing an Ad***

Courtesy of Julie Wright, President of **Wright-On Communications**

1. A one-time exposure is not an adequate investment to get the return you seek. Avoid running an ad infrequently. This is the most classic of all advertising errors. Readers need to see an ad multiple times.
2. Don't have unrealistic expectations. The first time someone sees an ad, they normally don't go running for the phone. The first ad creates awareness. Exposure increases interest and, over time, the possibility of action.
3. Avoid including too much information. The message is more effective if it is focused. Instill one to three key thoughts. Studies show people can remember this amount – much more and they do not retain well.
4. Don't draft your message around what you want to hear but around what your clients want to hear. Understand their hot buttons and then craft your message. If you are not sure of what they want to hear, ask them – before the ad goes to print.
5. Avoid the dull and boring stuff. Make the ad more memorable by considering the use of color.
6. Don't use poor quality photos and graphics. While pictures get more attention, poor photos and graphics can say more about you than you intend.
7. Don't forget to insure you identify all the ways the client can contact you in the ad. Websites and e-mail addresses are often forgotten as valid communication channels.
8. Don't run the ad all over the paper. Readers get used to seeing the same things in the same places. Try for consistent placement.
9. Don't do it by yourself. Call the advertising department of the newspaper you seek to publish in. The rep assigned to your industry or geography can explain their services. Some will design the ad versus you out-sourcing to a graphic designer. They can also explain the circulation, market area as well as the difference between banner and wrapper ads.
10. Don't forget to collect data and analyze it to understand if your ad is effective. By adding a distinct phone line for incoming calls or asking how the client discovered you when the call comes in on an existing line, you will be able to make intelligent decisions about the ad's viability. Run return on investment calculations. Why run the ad to generate leads if it does not do so?

## Publicity Tactics

Publicity tactics include press releases, sponsorships, trade show participation, community relations and more. The following tools can help you decide if you want to spend your time, energy and money using these marketing tactics.

### **Press Releases**

Whenever you earn a certification, attend a conference or have something news worthy, you should submit a press release to your local newspaper and other venues. This is free advertising for you! Sample press releases and articles about how to write a press release are available on the Intuit websites and in the Grow Your Practice Section of the ProAdvisor website (ProAdvisor.intuit.com).

**Sponsorship/Exhibiting and Doodads** – Should you or shouldn't you? Sponsoring a golf hole, organization, event or a Little League team can be a very good idea. Spending time exhibiting your wares and buying promotional doodads can be a great thing if you are memorable and it helps you reach your target market. You need to know certain things up front before you choose to spend your marketing dollars here. What visibility will your firm get? How can you leverage? What are your expectations? Are you reaching your target market? Does the benefit justify the cost?

**Community relations** – Being visible in your community means participating in local events. Though you may choose not to take a leadership role if running the business is work enough (!), create a presence for you and your firm by showing up at important community events. It's not just "to be seen", it is an opportunity for networking and giving opinions that represent your clients' collective views.

## ***Checklist: Writing a Press Release***

### **When to Write**

- Celebrate a significant business milestone such as years in business or number of customers served
- Introduce readers to firm-sponsored educational events
- Announce the results of corporate philanthropy efforts in conjunction with a charity
- Identify a change in the business landscape which hasn't yet been written about
- Share your corporate opinion on an event in the news

### **Planning to Write**

- Define your objectives, audience and tone
- Think about what you hope to accomplish and what reaction you intend on eliciting.
- What do you want to say and to whom?
- How do you want to sound?

### **Writing**

- Capture the reader with a “grabber” – a headline which warrants the reader to read on. It should be short but get the point across.
- Write in the third person, in a journalistic style as if a reporter is writing a story..
- The first paragraph announces “what and why?” i.e., What is this newsworthy item and why is it important?
- Add, “who and how?” immediately thereafter. i.e., Who is responsible for this event and how did they do it?
- Quotes from these decision-makers and influencers are then integrated. A press release without a quote is like an Oreo without the filling. There's something missing. The art of preparing a quote is to make it factual. It must not be so full of hype as to cause a lack of credibility.
- Add the “when and where” if the press release is inviting an action like requesting the audiences' presence at an upcoming event. If reporting an event that has already taken place, “when and where” may also be better placed after “how.”
- Every press release ends the same with standard company boilerplate information in the last paragraph. Also, the contact information, phone/e-mail, release date and website should be included either at the top or bottom of the release in case questions arise.
- Preferred length? The average is 400 words.

## *Checklist: Promotion, Sponsorship and Exhibiting—Important Questions before Committing*

### **Purchasing Promotional Items**

- What does your audience need?
- What is your objective?
- How will you use the items? (Think about all the ways you can leverage.)
- Are they functional? (Cushballs and cute stuff is out.)
- Will customers use them, throw them in the desk drawer or give them to their kids?
- Are they unique in some way? (Same ol', same ol' is – just old.)
- Are they a cool techie gadget that only has value to certain customers?
- Are they tailored to your customers?
- Will your logo or name be prominent or an after-thought?
- What is the expected shelf life?

### **Sponsorship/Exhibiting**

- What people will this event attract?
- What sponsorships levels or exhibiting locations are available?
- What have they defined as the benefit to you?
- How many times will you be seen or mentioned?
- How many people are expected?
- Will there be media coverage?
- Can you provide some of your promotional materials as part of the deal?
- What is needed from you if agree?
- What is the turn-around time for what is needed from you?
- What are the payment terms?

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## **Client Retention and Keeping Your Clients Satisfied**

It is critical for your reputation and the success of your practice that you provide quality services for your clients and ensure that they are satisfied. A client that is satisfied is also a great source of referrals, testimonials and as a reference. Here are a few tips to follow to help ensure client satisfaction:

- Return phone calls promptly
- Update voicemail to reflect your status
- Answer emails promptly and professionally
- Create 'template' emails
- Add graphs to the financial reports for clients
- Keep track of the client's professional life
- Ask about their expectations
- Research the market and industry
- Stay current on developments in the industry and with technology
- Keep staff members updated on clients

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## Tracking the Effectiveness of your Marketing Methods

You should track the effectiveness of your marketing methods and refine your strategy based on the results. If a certain method is not really working, consider how you might change it to get better results or decide if you should discontinue that method. For example, many people have decided that the cost of a yellow pages ad is no longer justified since they are not getting clients from it. A few tips for tracking the effectiveness of your methods:

- Always ask new clients or calls from potential clients how they found you and track the results.
- Look at statistics and reports on your website and blog that reveal the number of visitors, where they came from, keywords searched and more.
- Include a code in ads, postcards or mailings that you can use to track the results.
- Solicit comments from others and listen to their feedback and comments.
- Analyze what other accounting professionals are doing and determine if you could adopt a similar method if it appears to be effective.
- Quantify your results to use as a case study/testimonial—ie Based on your work, you saved a client X amount of time or money.

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# The 7 Non-negotiable Laws of Small Business Marketing – by John Jantsch

## **Break Them at Your Own Risk**

In my experience, most small business marketing either fails or has no impact whatsoever because most small business owners break non-negotiable laws of small business marketing.

The items on this list are laws because, like basic laws of nature, they exist whether a business owner accepts and practices them or not.

There are many ways to take advantage of the workings of these laws, but the real power comes from using several or all of them in chorus.

## **The Law of Market Focus**

Most small business owners attempt to be all things to all people and in effect never really establish any form or brand or notoriety for doing something well.

This all starts out innocently enough. A business owner has a very specific target market in mind but then the phone rings and someone asks them if they can do something and then the wheels in their head turn and next thing you know,... “Well, I don’t know how we could do that but we’ll figure it out.”

Then just like a pinball machine, they bounce to and from the next great opportunity. I know you don’t do that but surely you know some business owner who does?

You must narrow your market focus in order to grow. Take a look at your current client mix. What most business owners find is that they have attracted several types of clients that make up most of their business. Other firms find that a certain service or product accounts for most of their profit.

Take the hint and drop out of everything else. Become known a specialist in a niche market and you will not only generate far more business, you will find that as your reputation in that market grows you will be able to charge a premium for your services.

## **The Law of Differentiation**

Most buyers assume all businesses in a certain industry are alike. So when they go to the Yellow Pages or some other vehicle to choose one over another, they use the only thing they can think to measure - price.

So in effect, if you can’t find a way to differentiate your firm, you will be forced to compete on price. (Warning: Someone will always be willing to sell for less.)

Specializing in a market niche as explained in the law above is one way to differentiate. Creative marketing can set you apart. Offering to deliver your product, packaging your product with other products, having your client’s car hand washed while you meet, baking cinnamon rolls in your office, sending hand written thank you notes, are all ways to set your firm apart.

Look for opportunities to differentiate your firm by asking your current clients why they do business with your firm. They may be able to tell you how you are different in ways that will make sense to other potential clients.

Finally, it’s not enough to simply identify ways that your service or product is different; you also need to communicate that difference and make it a central theme in all of your advertising efforts.

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## **The Law of Education**

People don't like to be sold to. Your advertising and marketing must offer them useful information that addresses a concern or need that your target market has. Any follow-up marketing must continue to show them how your firm is different and how it is uniquely suited to solve their problems.

Make sure that your marketing materials not only describe your products and services but also include case studies or specific examples of how your customers benefit from doing business with your firm. Offer testimonial comments from satisfied clients. Offer information that describes your firm's processes and procedures. This type of information adds value to the services you offer and makes potential clients more confident that you can deliver as promised.

## **The Law of the Prospect**

Once you define your target market, you have really only identified a group that you suspect needs what you do.

Your advertising efforts must focus on getting a group of those "suspects" to raise their hands and tell you that they want to know more about your firm. Once they do that, then this group becomes your prospect group.

The sole purpose of your advertising is to create prospects first and sales second. 2-step advertising, or advertising that offers free useful information is the most effective lead generation tool you can use.

Your prospects, those who ask for more information, have now given you permission to sell to them. They begin see your firm as one they can trust due to your willingness to give before you ever ask for anything in return. They are more qualified after reading your information. They are more prepared to pay a premium for your services because they more fully understand the value you can deliver.

## **The Law of Testing**

Some of the most effective ads of all time were the result of pure luck. Most, however, were the result of trial and error.

80% of the success of an ad comes down to the effectiveness of the ad's headline. In some cases, changing one or two words dramatically impacts the results. Every ad, including your Yellow Pages ad, that your firm runs must have an impactful headline. If you don't create a headline that gets your market's attention, you are wasting your time. It follows that 80% of your time used in creating your advertising should be spent on getting your headline right. Study past successful campaigns to learn how to create powerful headlines.

Unless you are willing to bet on getting lucky with your advertising, you must test every aspect of it. Run the same headline in a split group of direct mail pieces. Change your offer and measure the impact. Change the information in your 2-step ads.

Smart advertisers test and measure everything they can. Advertising is an exact science, but no one can tell you exactly what works and what doesn't work without testing. Sure there are set laws and principles, but when it comes down to words, phrases and benefits, the only thing that matters is response.

## **The Law of Doing More**

It is difficult and often expensive to generate a new client. Doing more business more frequently with your current clients is a great way to build a business.

The hunt for new clients is where most businesses spend the bulk of their time. However, focusing on your existing client and looking for ways to get a larger "share of client" is where the money is.

As you build your reputation in your narrow target market, you can begin to look for more ways to serve them. You have already built a great deal of trust with your existing clients so expanding with their needs in mind is the simplest way to grow. As you meet more and more of their needs, they come to view you as a crucial resource and then are more willing to help you build your business by other means such as referrals. And speaking of referrals...

## **The Law of Referral**

The last law or small business marketing rule is one of expectation. Expectation alone often creates desired results and generates the necessary actions for those results.

Make the providing of referrals an expectation and condition of doing business with your firm, and you will double or triple your business in a short period of time.



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Each time you acquire a new client, inform them up front that you prefer to build your business by referral. At this point, ask them to agree that if they are as satisfied as you know they will be that they will provide your business with some set number of referrals in a set manner within some set period of time.

When they know that's the deal going in, then they will simply accept it. The other great thing about this type of expectation is that it makes you better. If everyone in your firm knows that every client must be so thrilled that they are willing to refer their family and friends, then everyone focuses on customer happiness. And that's a good thing.

An entire book could be dedicated to each of these laws and the various manners in which they can be practiced in the small business but for now at least you know the rules of the game. Go out and win.

*John Jantsch is a veteran marketing coach, award winning blogger and author of Duct Tape Marketing: The World's Most Practical Small Business Marketing Guide published by Thomas Nelson*

*He is the creator of the Duct Tape Marketing small business marketing system. You can find more information by visiting <http://www.ducttapemarketing.com>.*