



Build Your Firm®

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Marketing for Enrolled Agents

White Paper Series

Why Enrolled Agents Should Embrace

SOCIAL MEDIA



(888) 999-9800



BuildYourFirm.com



info@BuildYourFirm.com

Social Media for Enrolled Agents



Using social media to promote your accounting and tax firm is like kicking your business profile into high gear. When properly executed, a social media marketing plan can:

- ✓ Boost your online presence
- ✓ Connect you with your target audience
- ✓ Establish you as an expert in your field

Welcome to the New Age

Establishing or upgrading your social media presence is more essential than ever. The events of 2020 forced massive shifts in human behavior, accelerating an unprecedented spike in digital channel usage, and catapulting digital engagement platforms to the top of the marketing food chain. Even those individuals who once resisted digital interactions have warmed up to online engagements.

There is no denying the undeniable. **Social media has emerged at the forefront of the digital engagement frenzy.** The United States tops the charts with one of the highest social network penetration rates in the world. According to a recent Statista study, over 70 percent of the adult U.S. population holds at least one social media profile¹.

How you connect and interact in the online world is pivotal to your firm's reputation and overall success.

Bottom line – it's high time to beef up your online profile.



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¹ Statista

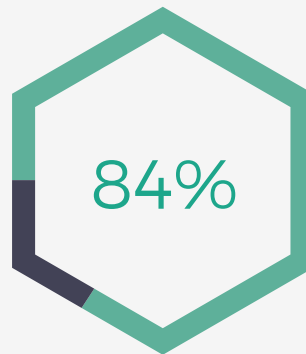
B2B Audience Builder



With its prolific growth, It's no wonder why 78 percent of small businesses leverage social media to attract new clients². And if you think this doesn't apply to your B2B professional services, consider these statistics - 84 percent of business executives use social media to help make purchasing decisions³, and 65% of B2B companies have acquired a customer through LinkedIn⁴.



78 percent of small businesses leverage social media to attract new clients ²



84 percent of business executives use social media to help make purchasing decisions ³



65 percent of B2B companies have acquired a customer through LinkedIn ⁴



When searching for professional services, potential clients are increasingly tapping social media as a relevant research tool. Company profile pages are the perfect place to “check under the hood”. Potential clients flock to Facebook and LinkedIn company pages for additional insight - here they can scan your services, peruse your posts, and read your reviews.

Think of your social media profile as an extension of your business persona – an inside look at your company culture, customer experience, and depth of services. Use your social media to tell your company story, promote what's unique about your firm, and expand engagement with potential and existing clients.

² Relevanza, ³ IDC Research, Inc.

⁴ Foundation Inc.

Social Media Anxiety



A chief complaint from enrolled agents is that time spent on social media is time spent away from their work at hand. The fact is, social media does take a lot of time, especially when you are just starting out. Curating content, uploading photos, and composing posts can be extremely time-consuming, not to mention the number of social media platforms to choose from. There's

Facebook, Instagram, Twitter, and LinkedIn, and those are only the top four!

Most enrolled agents simply don't have the time, willingness or comfort level to sit down and learn the ins and outs of social media. A general lack of know-how or engagement with social media ultimately inhibits the development and execution of a long term social media plan.

Even for those enrolled agents who do know how to navigate social media, having adequate and appropriate content to post regularly can be a major stumbling block. Posting sporadically on social media confuses your audience, lessens the likelihood of engagement, and diminishes the chances of gaining new followers.

The end result is lost opportunities to connect directly with your target market and prove your expertise.

However, when leveraged correctly, social media helps build your brand, expand your internet footprint, and ultimately helps generate quality leads.

DID YOU KNOW?



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6 Ways to Leverage the Power of Social Media

No doubt, social media is making a lot of noise, but without knowing how to harness the power of these highly influential platforms, social media is just that - NOISE. There are a number of ways to leverage the power of your social media profile, helping expand your reach and encourage engagement with your accounting and tax firm.



1

Amass an Audience

Setting up accounts on Facebook, LinkedIn and Twitter is a step in the right direction for building a strong network. However, posting content to a social page devoid of connections and followers is pointless. Without a captive audience, your post and

insights will go unheard, unseen, and will eventually waste away - you are essentially wasting your time.

Many business owners set up social accounts, but don't know the first thing about growing a following on each channel. Start out by connecting with your friends and existing clients. Invite, follow, and message everyone you know.

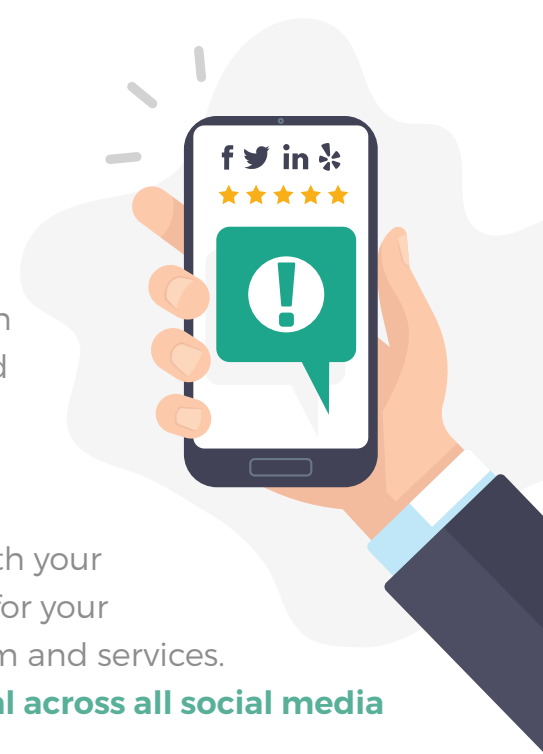
Next, make new connections with industry contacts in your target audience. For instance, if you specialize in construction accounting and tax services, consider adding construction business owners to your LinkedIn networking circle.

Not only are you more likely to engage with a prospect if you're connected, these types of connections are a direct pipeline for **discovering trends, gaining insight, exchanging information, and sharing your expertise** in a particular accounting niche.

Industry connections help you stay in-the-know on changes within your niche, and help further your position as a tax professional in your particular area.

2

Build Brand Awareness



Social media provides yet another opportunity to project your firm's brand image and messaging. Branding is more than a logo or color palette. Branding defines you as a company and includes your firm's mission, core values, and attributes that set you apart from the competition.

On social media, branding is developed in layers beginning with your company profile. Start out by uploading a square format logo for your profile image, and use a cover image representative of your firm and services.

Make sure your logo, color palette, and messaging is universal across all social media platforms, as this aids in brand recognition.

Consistent branding also extends to the actual content you are sharing on social media. When choosing content, ensure your posts are aligned with your services, core values and messaging. A consistent brand voice supports the image you want your brand to portray.

Build a strong brand by pushing out consistency across all client touch points, including social media.

3

Engage Your Target Market



As stated earlier, social media has emerged at the forefront of the digital engagement frenzy, so go ahead and get engaged! **Polls, surveys, statistics, and newsworthy tidbits** invite audience participation and strike up conversations.

As the name implies, this is your chance to get to know your audience on a direct interaction level. Unlike conventional media, social media channels provide two-way communication. Respond to comments and questions to keep the lines of communication open.



4

Increase Website Traffic

Social media posts are a great tool for driving traffic to your website. Sharing relevant content from your website to your social media pages is an efficient way to acquire visitors to your website. Use blogs, articles, and videos as content “carrots”.



5

Humanize Your Business

A key reason why social media channels are so successful is because they foster two-way conversations with a target audience. People are more apt to engage if they feel like they are talking to people, not a faceless business. When posting content, include photos of people, including staff and clients. This tactic provides an immediate personal connection.

Some other “humanization” practices include regularly **sharing office updates, special awards, client testimonials, or and community events your firm is involved in.** Remember, your followers want a window into your firm. They want to see the culture of your company and staff. It’s a look behind the scenes.

Social media embraces creating dialogue and nurturing relationships. Create conversational posts as if you are talking with a person.

79%
job applicants use social media
in their job search

70%
employers use social media
to screen job candidates

73%
Millennials found
their last job through
social media⁵



6

Recruit Employees

Social media can also be a helpful recruitment tool when you are seeking to add new employees. According to Glassdoor, 79 percent of job applicants use social media in their job search, and about 70 percent of employers use social media to screen job candidates. A whopping 73 percent of Millennials found their last job through social media⁵. It’s an excellent way to showcase your firm and your company culture. You can specify what you look for in an employee and screen potential job candidates.

If leveraged correctly, social media has a cornucopia of benefits for enrolled agents. Some additional fruits include establishing yourself as a thought leader, managing your reputation, and generating more leads.

⁵ Glassdoor

Social Media Best Practices

The nuances of using social media correctly and effectively (i.e. best practices) are dynamic, changing with technological advances. **More than ever, people use social media to maintain their connection to the outside world and do business.** While each social media platform has its own best practices, some general guidelines apply.



Post Frequency

An active presence is essential for capturing and maintaining audience interest. But over-sharing can be a turn-off. Finding the sweet spot for how often to post can be tricky. For example, many marketing sites suggest posting twice daily on Facebook; however, research shows that 23 percent of Facebook users check their feed a minimum of five times each day⁶. So, does that mean you should post more often than twice daily? No. Post relevance is more important than post frequency. Make every piece of content you share meaningful to your audience to boost engagement.



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Engage Readers

Engaging readers is your goal when sharing on social media. Some best practices to follow to meet this goal are

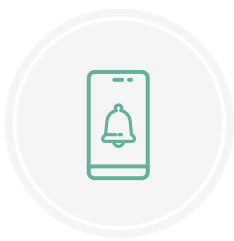
identifying your target audience and creating content they

need and want. Chances are,

if you come across an article that interests you as an accountant, some golden nuggets in it will interest your audience on social media. Perhaps you pull a pertinent quote and share it. Just remember to credit the author and link to the original document source. Never copy and share an entire article without permission.



⁶ Search Engine Journal



Relevancy

The content you share - whether it's an article, an image, or a statistic - should be current, relevant, and high quality. Providing your target audience with meaningful content that resonates with their needs will make you a go-to source and keep you top of mind with current and prospective clients. For example, if your target audience are dentists, let your knowledge of that niche industry shine through each post. Staying in front of your target audience with valuable content can compel them to take action.



Use Visual Assets

When sharing content, keep in mind that visual content is over **40 times more likely to get shared on social**

media than any other type⁷. Facebook posts with images receive 2.3 times more engagement than those without images⁸. Even if it's an accounting quote, tip, or article, include an image that complements the copy. Choose images from the public domain or sources that offer copyright-free images. Keep in mind visual assets include digital elements like video, memes, diagrams, GIFs, screenshots, photography, or other types of images. The type of visual assets that are most effective varies by platform.



Vary Content & Multi-Platform Customization

The type of content you share depends on where you share it. Facebook, Instagram, Twitter, and LinkedIn are the top social media platforms for businesses. The secret to harnessing the power of all these platforms is to customize the content you share. For example, on Facebook, short videos and blog posts resonate the most. Twitter users prefer news-related content. Instagram is image-driven, and 60 percent of LinkedIn users favor industry insights.

That may mean you share a report on LinkedIn, pull a key quote from that piece to share on Instagram with a compelling image related to the topic, and make a short video introducing the report to share on Facebook. Even in different forms, you are sharing important information that readers want and need.

⁷ Buffer Social

⁸ Buzzsumo



Share Timely News

Sharing newsworthy information and tax deadlines is another way to reach your audience and provide valuable information that will keep them engaged. For example, sharing news about the latest tax laws, accounting and bookkeeping tips, accounting software tips, or frequently asked questions that you receive from clients, are all noteworthy items for your intended audience.



Add Hashtags

Whatever you share on social media, familiarize yourself with hashtags. You may know it as the "pound" symbol on your keyboard or phone, but in social media, # means hashtag. It is a way to group related content. Hashtags begin with the # symbol and never contain spaces, symbols, or punctuation. Short is best, and relevance is key. For example, some popular accounting hashtags are #accounting #finance #tax #bookkeeping #taxes #enrolledagents #payroll #taxseason #accountingservices.

You can see that these are brief, easy to read, and relevant to your industry. Place hashtags at the end of a post and limit yourself to a few related to the content shared.



Create a Post Calendar

Once your best practices are in place, it is important to generate a post calendar to schedule when your content will go live on your social media channels. A post calendar can be as simple or as complex as you'd like.

Regardless of your method, using a content calendar will help you keep organized so that there's no last-minute scramble to figure out what to share. It will also ensure that you maintain a consistent posting schedule, which is critical – your goal is to show up regularly in your audience's social media feed so that you're always top of mind for current and potential clients.

Post calendars also help you keep track of important dates, deadlines, and holidays so that you can look ahead and plan your content creation.

Of course, even if you consider yourself somewhat social media-savvy, thinking about content creation, learning and following social media best practices, and finding the time to implement all of these strategies may seem overwhelming. Establishing and maintaining a professional social media presence can be a full-time job. That's why many firms outsource their content marketing. It's much more affordable than hiring a full-time tech guru and far more time-efficient than trying to manage it in-house.

Social Media Marketing for Enrolled Agents



Communication has changed dramatically in recent years, with many conversations and buying decisions occurring online and on social media. Now more than ever, social media is essential for tax professionals. Creating and implementing a social media strategy for your firm can be a daunting task. But with 78 percent of new businesses attracting customers through social media, the odds are high that you're losing high-quality leads that could convert to long-term clients.

Social media is a value-added, effective medium for marketing your firm and solidifying your brand to build credibility and establish trusting relationships with existing and prospective clients. The secret to effectively doing this is implementing a consistent plan of sharing relevant content that your audience needs. That means using visual assets where appropriate, varying the content you share, such as short videos, professional articles, and don't forget to use the correct hashtags!



If all this seems like a great idea but one you don't have the time to execute, we understand. At Build Your Firm, this is what we do. And we know it can seem overwhelming. That's why we created our Content Marketing-in-a-Box program for enrolled agents and accountants. It gets these critical social media tasks done for you and frees your time to focus on your daily business goals and challenges.

About Us

Build Your Firm Content Marketing in a Box

Social Media and Reputation Management Solutions for Enrolled Agents

Build Your Firm's Content Marketing in a Box provides social media, video marketing, reputation management, and local SEO services specifically designed for enrolled agents and tax professionals.



If you are looking to outsource your social media to trusted experts that understand tax professionals, our social media marketing services can get you on the right track to expand your digital presence.

Our social media services include industry-specific content with regular postings, brand consistency and optimization throughout the most relevant social media platforms, a dedicated social media expert to carry out your monthly plan, and proven strategies for acquiring valuable online reviews.



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