How to keep the client conversation going

Technology builds stronger client connections

Communicating with your clients can be hard. But technology can help. Your clients want to talk to you, but they want you to do it on their terms.

If you have become used to communicating in your own way, you might want to re-examine your methods. Many favor newer digital and mobile communications. You’ll get better results if you learn to use them correctly.

This doesn’t mean you should stop using traditional techniques. Direct mailers, brochures, print ads and even expensive television and radio spots still apply and are appropriate to use. However, these no longer work on their own.

Use this guide to help you connect with clients the way they want to connect with you.
Importance of online branding

Your success depends on what people know about your firm. They are choosing you based on reputation. Where do your clients shop for services? Their first stop is likely the web.

Your website is the first place a prospective client will go to learn more about you. The first step to a successful website is to choose and register a domain name. This name should be unique but also reflect your business. Search engines look at domain names when creating results. Be sure to include your business name and service so it is searchable. And keep your domain name easy to remember.

Once you have chosen a domain name, pick a platform. Weebly, WordPress and Wix are easy-to-use website builders. Create content for your page and design your website. If you need help, consider hiring a web designer to create the page for you.

Online branding is vital to your firm’s success, and it goes beyond your website. Countless places can drive your digital brand.

Consider applying for free accreditation from the Better Business Bureau. Your business will receive a letter grade — A to F — like a school report card. The more reviews, the better the score. If you get a negative review, reply quickly and resolve the issue. That will keep you at the top of the class.

Websites such as Yelp, Angie’s List and Expresit allow people to post reviews about local businesses. These sites have tremendous power to persuade other people to seek out your services.

Encourage your happy clients to leave a review. If someone leaves a bad review, resolve the issue by replying on the site. Remember: just one bad review is enough to affect your online reputation.

Your clients and potential clients are on social media, listening to podcasts and reading blogs. Are they finding your name out there? If not, it may be time for a technological overhaul.

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Fun facts

Businesses risk losing 22% of customers when they find a negative article about the product.¹

More than three-quarters of adults own a smartphone.²

58% of companies use video conferencing every day.³ Almost half of smartphone owners said it’s something “they couldn’t live without.”⁴

82% of customers conduct research online.⁵

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¹ moz.com/blog/new-data-reveals-67-of-consumers-are-influenced-by-online-reviews
² pewresearch.org/fact-tank/2017/06/28/10-facts-about-smartphones/
³ lifesize.com/en/video-conferencing-blog/productivity-results-are-in
⁴ pewinternet.org/2015/04/01/chapter-two-usage-and-attitudes-toward-smartphones/
⁵ forbes.com/sites/forbespr/2016/05/25/customers-like-to-research-online-but-make-big-purchases-in-stores-says-new-retailer-study/#7dda4cf9244b
Social Media 101

LinkedIn, Twitter and Facebook are the best places to grow professional connections. Each network has zero startup costs and its own set of best practices.

- **LinkedIn** is perfect for showcasing your services and promoting your firm. You can use articles and interest groups to get your voice heard and make virtual connections to clients and other CPAs. Also, LinkedIn is an excellent source for new talent. Post job openings and browse the resumes of potential hires.

- **Twitter** is a snapshot of today’s news, so users know what’s happening as it happens. You can tap into that. Think about it. What can you say about your company in 280 characters or fewer? Drive traffic to your website with links to your page and other social media profiles. For the most impactful tweets, use bold images or videos and add hashtags. Engage with other users by retweeting and replying.

- **Facebook** is huge. With more than one billion users, it’s a must-have for online branding. After a simple set-up, your business page is instantly searchable. Be sure to post frequently and keep posts short and specific. And don’t be afraid of visuals such as infographics, GIFs and short videos. Put your business in front of a larger audience on a shoestring budget with Facebook ads. These are much cheaper than traditional ads.

The networks create two-way conversations, so you must pay attention and post regularly. Always monitor your page for comments, messages and reviews. If you ignore a potential client, they won’t hire you. Respond quickly.

Be smart about what you post. When using social media, your client’s confidential information is at risk to be shared in public.

Train employees on best practices for social media. Consider using social media management tools such as Sprout or Hootsuite to keep track of what’s being said on your pages.

Email

Email is an important way to reach clients, but it’s begun to fall out of favor. A cheap and simple way to reach a broad audience, email is often overused by senders and unwanted by recipients. But it can still be a useful tool.

- **Permission** — Make sure your client hasn’t asked you not to email them. This is important. The CAN-SPAM Act outlines strict penalties for emailing someone who has asked you not to. It also defines what is required in your email for it to be compliant. Penalties can be as much as $40,654 per email that violates the Act. Be familiar with this law.

- **Frequency** — If you email your clients too often, or with information that isn’t useful to them, you risk losing their attention. If you plan to send an email, have a clear reason for doing so. Unlike social media, people don’t want to see new emails from you on a regular basis. Unless you are communicating directly with a specific client about their files, limit your emails to no more than once a week. Less can be better.

- **Content** — It’s a good idea to assume everyone you email is busy and has little time to read. Keep your emails brief and to the point. Include a visual or visuals if possible. Visuals break up your copy, make the content more engaging and can work to illustrate a point better than words when used correctly. You are likely to get a better response to your email if you have a clear “call to action,” or a few sentences that explain what you want the reader to do. This can be as simple as, “call us for a consultation.” If you want your clients to do something complicated, like preparing their paperwork for filing season, consider bullet points or numbered steps.
• **Subject** — Having a clear, eye-catching subject is crucial if you want clients to read your email. This is especially true when emailing a prospect. However, some subjects will cause your recipient’s email program to mark your email as spam. Your message might be marked as spam if it contains the following:
  - Exclamation points
  - Substitute characters (H3ll0! Th1s 1s an 3xampl3.)
  - All caps
  - Too many characters
  - The words "buy," "sell" or "free."

Writing a good subject is easy. Keep it short, simple and representative of your email. Many email programs can display 50 characters, so your subject should be that length or less.

• **Using marketing email providers** — Many companies offer a service to send your emails to a large audience. They offer templates that make creating and sending an email very easy. You can use tools that tell you how many people opened your email. You can even find out how long they spent reading it and whether they clicked on any links.

While these companies can be helpful, they are sometimes blocked by email service providers as spam suspects. If you choose to use one of these services, check after your email goes out to make sure it was delivered. If it wasn't, you should contact the marketing email provider to let them know your message was rejected for some (or all) recipients.

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**Skype/other teleconferencing tools**

Times have changed. In-office meetings are going out of style. Clients are as busy as you are. It’s often hard to make it to your office for a meeting during work hours. However, you can keep the personal touch of an in-person meeting using teleconferencing.

You can meet with your clients anytime — and anywhere. Virtual meetings are popular. They are also remarkably easy to use and accessible. You can be face-to-face with your client on your smartphone.

These meetings can be held on short notice and squeezed into your tight schedule. And you’re more than just a voice on the phone. Just like in-person meetings, you benefit from seeing the person in front of you.

Some of the most popular teleconferencing tools are Skype, Zoom, ezTalks and GoToMeeting. Download these for your smartphone. A lot of times, these apps are free to use.

Select apps that offer security for your call, and make sure your client has a device capable of using it. And be adaptable. Your clients are most likely already using these services. So be sure to ask what app your client is using. Then learn it.

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Cybersecurity

You've heard the stories. Thieves are stealing data from computers all over the world. But it's possible to lose data through carelessness as well as hacking. There are many best practices to follow, but here are some tips that you should consider at a minimum:

- Social Security numbers, bank account numbers, driver license numbers and addresses must not be included in email. It is wise to avoid disclosing sums as well. If your email is intercepted, writing about a large dollar amount could paint a target on your client or your office. If you have vital information to exchange with your client, make sure to use a secure portal, mail the documents or hand them to the client in person.

- Avoid texting clients about their files. Reserve texts for important updates about your firm, setting/confirming appointments or letting a client know you need to hear from them over a more secure method such as voice call.

- Understand the risk* and plan ahead. Design and implement a data security protocol for your firm, including steps you will take in the event of a breach. (*link requires login)

- Encrypt your files. This way, even if there is a breach, there is still a good chance hackers will be unable to read your data. Both Windows and macOS have built-in file encryption abilities.

- If you keep your files locally rather than in the cloud, be sure to use a firewall to help prevent hacking intrusions. Your cloud service provider, if you use one, will have this protection already.

Thieves are stealing data from computers all over the world. But it’s possible to lose data through carelessness as well as hacking.

It’s wise to be familiar with the types of attacks. Though there are many, here are a few of the most common:

- **Phishing** — These attacks come through as an email. It might be from a random source or could look very official. Sometimes these emails are hard to tell from legitimate emails, seeming to come from your bank or other service providers. Some will ask for sensitive information, such as account numbers. Others will contain a link that will compromise your systems or information if you click them.

- **Spear phishing** — This is like a phishing attack, but sent to a specific person or group of people. These are very customized fake emails. They might use information the attacker already has to make the email seem more real. For example, it might mention names of family members or a restaurant the target visits regularly.

- **Malware** — These are viruses, worms or Trojan horses. These are programs that can invade your computer and make data easy to steal. Usually, they come in email attachments you open without knowing what they are, but they can also be programs you download thinking they are something they aren’t.

- **Password attacks** — These are simply guesses at your password. They are often automated by the attacker using computer software or entered manually. A common type is called a "brute force attack," which consists of repeated guesses at your password until one works.

You should also talk to your clients about your security practices. Point out features of your communications, such as signature lines and logos that will help them be sure a communication is from you. Remind them annually that security is an important subject that requires all parties to be aware. Use that annual opportunity to update them about how your practice is staying on top of keeping their data safe. It’s just another way you can prove your worth as their most trusted adviser.
Mobile communications

Cellphones and tablet devices are quickly taking the place of the computer. U.S. adults spend nearly as much time per day on mobile devices as television, which is still the top medium. Many of your clients will visit websites, buy things and read email on their mobile device. For this reason, you should pay attention to mobile communications.

Look at your website on a mobile device. If it looks wrong, loads very slowly or some functions don’t work, it probably needs to be optimized. Talk to your web designer or web service provider if you don’t do this yourself.

Ask clients if they would like to get texts from your firm. Many younger clients use text much more than email or the phone. Remember never to use text for sending secure information. You can also ask them to follow you on social media, all of which offer “push notifications.” These are pop-up messages alerting users that there is an update to your account’s post.

Visual communications

If you’ve heard the saying “a picture is worth a thousand words,” then you know: a picture can quickly tell your client what you might need many words to explain. GIFs and JPEGs are small files, so they are usually the best formats for sending pictures or charts over text or through email. PDFs, or Portable Document Format files, are perfect for sending blank forms to your clients.

Just be sure not to send sensitive information in your photos or charts by mistake. For example, taking a picture of a box on a form you want to point out to your client is fine. But what if a different client file is on your desk or monitor and visible in the photo? Take care to review any photos you take to eliminate the possibility of sending someone else’s information by mistake.

Podcasts and blogs

A podcast is simply an audio recording. It can be uploaded to your website or sent directly to clients. You can even offer your podcasts to services that will distribute them for you to their customers. If you decide to create a podcast, keep it short. Many people won’t listen for more than a few minutes, so choose topics you can cover well in 3–4 minutes.

If you record your podcast yourself, use a good microphone and software to help you edit your recording. Try to pick a quiet place to record with no background noise. Speak clearly and in an animated manner. Avoid monotone. Ask a friend or coworker to critique you. Did you talk too quickly? Too slowly? Too quietly? Are you using terms that are easy to understand? Did you avoid crutch words such as “um,” and “uh?” The more you polish your podcast, the more likely listeners will be to come back for more.

Blogs are short articles published on the web. Like podcasts, you can send them to your website or choose a service to help you post and promote them. A blog post should be short — no more than 1,000 words if possible — and easy to read. Avoid long words and long sentences. Be sure to use spelling and grammar checkers. Also, include a picture or chart to help illustrate your blog. A visual element like this will help drive readership. Finally, choose an interesting or provocative title that will attract readers.

You can also use your blog in an electronic newsletter or print them to include in welcome materials for new clients. Writing your own articles communicates knowledge and authority. It’s a great way to show your clients you know your stuff.