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Time to Socialize: 6 Steps to Social Media Savvy

Using sites like LinkedIn and Twitter to engage your clients and increase your reach is essential in today's economy. Consider these six tips to transform your online presence and bring in new business



“Over 10 years ago, websites became essential to a firm’s marketing strategy,” says Barry MacQuarrie, CPA, Consultant at KAF Financial Group and a speaker at the [CCH Connections: User Conference 2011](#). “Today, people expect to find and communicate with their tax and accounting professionals through social media.”

MacQuarrie recommends six tips for firms seeking to leverage the strengths of LinkedIn, Facebook, Twitter and blogs. It includes a mix of ideas for beginners and for advanced social media users.

1. Observe and learn. Online training, conference seminars and educational videos can help in understanding how the various tools work. But once you sign up for an account, watch the interactions and etiquette before developing content.

Because of its professional bent, MacQuarrie suggests LinkedIn as a good first step for CPAs. “It’s an easy platform to learn,” he says. “Plus, a lot of your contacts, peers and associations are already there, so it’s comfortable to interact.”

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2. Establish “the ground rules.” Studying other CPA firms, associations or companies outside the industry can give you a head start on forming a social media policy and setting employee expectations. IBM's policy, says MacQuarrie, posted on its [website](#), is an ideal example. It supports the goal of encouraging employees to use social media while reminding them of professional conduct.

3. Think strategically. Social media doesn't require much cash investment, but it does require time and energy. “That's why strategy is so important,” MacQuarrie says. “You need to define the daily and weekly commitments required to keep up.”

4. Give and you shall receive. Social networking involves ample mutual back-scratching. “Anytime someone tweets and mentions your company, it's a good time to engage them in conversation or return the favor,” MacQuarrie says. “For example, firms use their Facebook fan page to promote an event that one of its nonprofit clients is hosting.”

5. Keep things fresh. To engage readers in your blogs, MacQuarrie advocates developing new content, repurposing existing newsletter and article content, and commenting on other people's works. For firms struggling with empty pages, he suggests having a skilled writer coauthor posts with subject matter experts. And don't forget that social media feeds into your main website — so keep that fresh, too.

6. Experiment with new tools and keep up with new technology. “Social media requires continuous learning and awareness of new products,” MacQuarrie says. “As an example, take Foursquare, which lets mobile phone users inform friends where they are and helps businesses drive traffic,” he says. “Or Groupon, which uses deals to create excitement about a company's brand.”