About This Webinar - Housekeeping

- ~45 minutes, ~15 minutes for Q&A
- Stay to the end: Special offers & prizes for the more active participants!
- Webinar will be recorded –
  - available soon for playback
- Have questions?
  - Attendees are in listen only mode
  - Use the “Questions” or “Chat” features to ask questions
- Webinar geared for small tax and accounting practices...
  - ...however, any business or practice will benefit
- Disclaimers:
  - Your mileage may vary
  - We are not attorneys: consult your governing bodies and/or legal representation for key ethics & legal issues
About This Webinar – What you will learn

✔ Background on word of mouth marketing
✔ Practical ways to generate positive online reviews
✔ Avoiding negative reviews
  ...and steps you can take if you get any
✔ Maximizing review websites to your advantage
✔ Next steps for you to build a five-star practice
About our Company

- Content Marketing
- Websites
- Search Engines & Online Directories
- Social Media
- Reputation Building
- Client Portals & Appointment Scheduling
- Lead & Client Management
- Email Newsletters
Digital Marketing Education

http://try.clientwhys.com/accountant-marketing-webinars/

Webinars, CPE, Seminars, Blogs, Email, Whitepapers

Today's Webinar

Reputation Building

Client Portals & Appointment Scheduling

Email Newsletters

Search Engines & Online Directories

Social Media

Lead & Client Management
About our Presenters

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In the “Old Days”…

“Offline” Word of Mouth Ruled

• Offline advertising helped to boost new client acquisition:
  • Yellow pages, newspaper, direct mail
• Word of mouth, referred clients always the best source
“Offline” Word of Mouth Tools

- Business cards
- Referral brochures
- Referral cards
- Print newsletters
- Pocket tax guides
- Direct mail
- Phone calls
Today: Word of Mouth = Online Reputation
Today: Word of Mouth = Online Reputation

- Review Websites
- Email, Text
- Mobile Apps
- Social Media
Poll Question #1:

Have you personally ever found a good product or service online, primarily by reading online reviews?
Importance of Digital Word of Mouth & Online Reviews:

- 92% of consumers read online reviews
- The star rating is the #1 factor used to judge a business
- Only 13% of consumers consider a business that has a 1 or 2 star rating
- ~70% say positive reviews make them trust a local business more
Online Reviews: More reasons to care about them...

- Increase website conversions
- Improve search rankings (SEO)
- Validate offline word of mouth
- Command higher fees & be more selective
- Great reviews can be the difference between high growth ...or shutting down
Poll Question #2:

Have you ever had a “bad” experience with a product or service that was referred to you by a family member, friend or colleague?
Five Steps to Building Your Five-Star Practice
Step #1: It Starts with You

- Provide a service worthy of five-star reviews
- Love and excel at what you do
- Be selective
  - in choosing clients and in what work you take on
- Be responsive, friendly, honest and transparent with clients
- Know your stuff
- Hire carefully
- Design and run smooth client-facing operations
Step #2: Build Your Brand Online

- What is your unique offering?
- Who is your ideal client?
- Build a great online presence:
  - Website, blog, SEO, newsletters, social media, profile pages, video, etc.
- Get more active online
  - Or hire someone to do it for you
Step #2 (cont.): Build Your Review Site Profiles
Step #3: Plan for and Ask for Online Reviews

- Where/when/how to ask:
  - Ask right up front
  - Ask when you complete the work or key milestones
- Set up operational touchpoints for reviews
- Use email technology
- Get help from staff and marketing teams
- Offer appropriate incentives
Step #4: Actively Respond

- Thank all reviewers and clients for feedback, testimonials and reviews
- Thank each reviewer individually (not always on the review site)
- Sometimes you may want to (carefully) clarify or correct errors in fact
Step #4 (cont.): Negative Reviews

• See Brad’s recent LinkedIn blog post
• Deep breaths, relax
• USE CAUTION
• Thank them for feedback
• Work things out (if you can)
• Clarify or correct errors
• Get more positive reviews
• Get help from peers and pros
Step #5: Toot your own horn

- Post portions of positive reviews to your website
  - Use “plug-in” tools to automatically post to your website
- Post snippets from reviews in social media.
- Use in email footers and display in any advertising
- Print copies of testimonials and online reviews for your office
- Take photos with your clients!
  - Attend our July webinar for more
Poll Question #3: Which Tax Professional would you choose?

H&R Block
4 reviews

I think i finally had it with this place. How I went yesterday and i had an appointment and my tax agent isn't there? And no one called me to notify my that she wasn't coming either I have a upper respiratory infection I would of stayed home. This place for many years I have been going to but I think its time I find another place all the money I spent you would think you would get a courtesy call? This place isn't professional at all!

1/29/2015

Jim Batten
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Phone (978) 686-5001
Visit Website
6:00 AM to 6:00 PM Monday through Friday and 7:00 AM to 4:00 PM Saturday during tax season.

March 20, 2015

⭐⭐⭐⭐⭐ Overall Rating
Jim has been doing our taxes for over 40 years almost all of our family goes to him. We love the ability to get a quick appointment. If you have a question and email him, he gets back to you within a short period of time. The newsletters are greatly appreciated as they help us to plan what to prepare for. I give him a 5 star rating.

Terry and Paul M (verified client)
Case Example:
Karen Drescher, CPA


TaxBuzz News / Thought Leaders

Karen Drescher CPA, A TaxBuzz Success Story

Lee Reams II March 15th, 2016
Category: Thought Leaders

As Warren Buffett once said, “It takes 20 years to build a reputation and five minutes to ruin it. If you think about that, you’ll do things differently.” Your tax and accounting practice is built on your reputation. So protecting your authority online is a key to your success. In this case study we show you how Karen Drescher, CPA has used TaxBuzz.com to attract five-star reviews that convert into real clients.

Meet Atlanta CPA Karen Drescher

Karen manages a growing Atlanta CPA firm that caters to individuals and small business owners. Karen was looking for new challenges when her son advised her to consider new technology... “if you’re older with technology, so it’s important to be connected with new audiences,” Karen says. As a result, she began using TaxBuzz.com. "Now I’m working with a new audience, we connect with people all over the country who are more digitally savvy. We are in a new world," she says in her Google review.

Karen started working with ClientWhys and TaxBuzz.com in 2015. She purchased the site in 2013. The first task was to start attracting five-star reviews on Google and other sites. As the reviews and growing, she is reaping the benefits. Karen says, “Since the practice, my business has grown 35%.”

Karen Drescher, CPA
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Mcdonough, GA 30253

Phone (770) 268-3434
Visit Website

Mon - Thurs: 7:30 am - 5:00 pm
Friday: 7:30 am - 1:00 pm

(21 ratings)
read reviews write a review

REQUEST APPOINTMENT
Case Example: Jim Batten, EA
Case Example: Lina’s Tax Team
Summary and Re-Cap

✓ Background on word of mouth marketing
✓ Five practical steps ways to build your 5-star practice:
  ✓ It starts with you
  ✓ Build your online brand & claim review sites
  ✓ Ask for reviews
  ✓ Respond... handling negative reviews
  ✓ Toot your own horn
Next Steps for YOU to build a five-star practice

✓ Inventory your online presence and reviews
  ✓ Claim and build our your TaxBuzz.com profile!
  ✓ Determine if corrections or responses are needed
✓ Build your core online marketing program
  ✓ Website, social, review sites, email newsletters, blog
✓ Set review goals for each review website
  ✓ Put a plan in place to get the reviews
✓ Enlist the help of office staff, client “champions” and a company like ClientWhys
Poll Question #4: Would you like some help?

(complimentary consultation)

Book time with Steve or Brad today:
http://demo.clientwhys.com/appointments/

- Complimentary reputation audit and recommendations
- Complimentary build out of your profile on TaxBuzz.com
- Assistance in generating positive testimonial reviews
- Help with avoiding review “landmines” and little known ways to avoid and/or fix them
THANK YOU!

Any Questions?

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Mark your calendars!

Next Webinar:

“How to Become a Social Accountant”

11am PT/2pm ET
Giveaways & Offers!

- 10 Gift Cards for the “more active” webinar participants
- Mention “WEB20” to GET 20% OFF the first three months for any new client or new add-on monthly marketing packages*
- $100 off TaxBuzz Pro packages
- Waive all set-up fees for any of our packages

* Some restrictions may apply. Offers expire and new service must be purchased by 6/30/16.