

CHECKPOINT MARKETING FOR FIRMS

# Beyond Social – Get Personal

Human Interest Content in Email Marketing and the Related Flow Through Social Media



## Continual Courtship

You are constantly in the process of wooing others to your business and working to maintain relationships with existing clients. You know your clients could be with another service provider, but they chose you instead. Ask just one of your clients why they are in business with you and you are likely to hear relational words such as trust, commitment, help, dedication, care, support, value and partnership.

Since you are in the business of forming and maintaining relationships, the courting dance is always underway. We know that face-to-face networking is a crucial factor in forming bonds with your clients and prospects, but it is also important to consider the relationship messages that your email marketing and social media communications are sending.

### What does a bad online marketing relationship look like?

A bad online marketing relationship might not necessarily cause the demise of your client relationships, but it certainly won't help build that bond and it will not get as many new prospects interested in your business.



Your emails and social media posts give prospects insight into your company and help you begin to build trust.

A flawed online marketing strategy can be a major turn-off. Spam, sales plugs, insensitive messaging, constant useless status updates and a here-today, gone-tomorrow social media presence are the benchmarks of a damaged online presence. These are the tactics you want to avoid. At the very least, this approach will provoke your email contacts to unsubscribe in droves and your social followers to abandon your social media platforms.

### What does a healthy online marketing relationship look like?

A thriving online marketing strategy can only enhance your client and prospect relationships. The first time you hear a client say, "I really enjoy receiving your email newsletter," or "I caught that article you shared to Facebook the other day," you'll understand how the good-will built by your face-to-face interactions can be strengthened by your online activities.

When interested prospects take a glance at your email communications and social media activities, this presents an opportunity for them to check you out and build interest in your business prior to the initial consultation. A well thought out email and social media marketing plan will drive prospects to you and keep existing clients happy.

### The rewards of the relationship

You might have to put a little work into wooing your prospects and you might also have to work a bit to "keep the magic alive" with your existing clients, but the reward is worth the effort. Courting your prospects and keeping the relationship strong with your existing clients will pay off in the form of new business and higher client retention rates. Happy clients are also more likely to refer you to an associate or friend, and your online activities create an opportunity for you to back up your client's recommendation with an engaging, informative online persona.

### What interests people?

People interest people. People enjoy stories about people. And guess what? Your business is run by people. The people who run your business — and even your clients — have stories to tell that will interest other people.

When you highlight your people as a part of your online marketing efforts, you won't have to give away Social Security numbers and dates of birth in order to become relatable to your audience. Being personal does not mean full disclosure. It means injecting the heart and soul of your business into your online marketing strategies.

It is important to relate to your followers in terms they identify with. Personalizing your messaging helps your communications stick with your audience.



All lasting business is built on friendship. — Alfred A. Montapert



Personalize your messages with partner photos and bylines to enhance credibility.

### Building the email relationship

When you complete an online dating profile, you first complete a profile and answer a series of questions that describe what you are all about. The matchmaking process begins when your existing strengths and attributes are aligned with another person's interests and qualities. Your email communications should follow this same methodology. First, determine what your organization can provide and then consider who may be in need of your various services and products. Your email messaging gets personal when you target your audience and speak directly to their interests and needs. Aligning your various practice areas, services and products with a relevant audience is far more effective than by haphazardly sending general messages to your entire database of contacts.

Personalize your messaging even more by drawing the connection from your partners or managers in charge of your various practice areas to the services they provide. This gives your prospects an opportunity to associate faces and names with your niches.

Credibility is built when those messages appear to come from your people. Include bylines, headshots, brief bios, contact information and formal greetings and closings to your messaging. Don't miss the opportunity to connect the dots between the services you provide and the people who provide them.

### Talk about yourself — just not too much

It is just fine to talk about yourself. After all, prospects looking for a service provider want to know more about you. But, talking exclusively about oneself can be a turn-off. Your email marketing also runs the risk of turning prospects away when your messaging sounds like a hard sell. Your communications should shy away from bragging and lean toward genuine exchanges about real people and the real services they can provide.

Beyond tying your partners and managers to email communications that touch on their areas of expertise, you can also let your readers know a little more about you, your clients and your staff when you highlight your people in a relatable way. Consider employing communications that shine a light on your staff members — perhaps in the form of a monthly staff member, partner or manager spotlight.

### Ideas for your own monthly spotlight:

- Partner's Corner: Monthly Expertise Straight from the Source
- 10 Things You Didn't Know About Jane Smith, Esq.
- Your Questions Answered by Our Manager, John B. Doe, CPA
- Professional Spotlight: A Behind-The-Scenes Peek at Jack C. Brown, CEO

You can also publicly congratulate your staff on their achievements — be they personal or professional. Having periodic human interest pieces in your email marketing can fuel conversation in your next business meeting and even inspire clients to call offering their congratulations. You'll want to make sure your staff is aware and has given consent to highlight some minor personal details prior to publishing these pieces. However, demonstrating a desire to share in the daily lives of your team is seldom met with opposition and a simple consent form or waiver can cover the bases.



Showcase human interest stories about your staff to enhance the bond between you and your readers.

And why not also periodically feature your clients? Your clients are sure to value the additional exposure their businesses will receive by being featured in your communications. Client spotlight pieces also give your firm an opportunity to feature a testimonial and a case study in the form of a story that your readers will enjoy. Your "client corner" articles could read like success stories, with the obvious conclusion that your firm helped make your client's triumph possible. You can also publicly acknowledge your clients' awards and accomplishments and even thank them for helping to make your business great.

Another great way to connect with your audience in a personal way is to feature your philanthropic and community involvement. Talk about individual or group participation in various endeavors that have nothing to do with your firm's services, but have everything to do with demonstrating that your business has a heart. If giving to others is part of your story, you're sure to win the admiration and acclaim of your contacts.

Messages that show off your team:

- Congratulatory birth, wedding and anniversary announcements
- New team member announcements
- Team member of the month awards
- Service anniversaries and retirements
- Graduations and professional achievements
- Award winner congratulations



## Five Ways to Get Personal in Your Email Marketing

### 1. Use their first name

When you know someone, you address them by their first name. Use your contact's first name in your messaging. Even better, use his or her preferred nickname. For example, Robert might be Rob or Bob. Do you know which name he prefers? Robert might not use his full name in his daily exchanges and if you don't know this, you run the risk of seeming impersonal in your messaging. Be sure to undertake periodic list hygiene to specifically troubleshoot your first name field.

### 2. Take a personal tone

Write your messages as if you are speaking to a person. Ask questions, direct the conversation to the individual and provide resources.



Your emails are a digital representation of you: they should look as tailored as you would in person.

Be sure not to talk too much in your email marketing. Concise messages are better received in this time-crunched world than those that force recipients to hash through paragraph after paragraph of information. If you have more to communicate than can be summed up in several brief paragraphs, provide links to additional resources. Make sure you call out your links and direct readers to them in an actionable manner.

### 3. Dress nicely

You'll also want to make sure your digital marketing and communications are visually appealing. You would dress appropriately for a date or a business meeting, and your messaging should follow suit.

Some key components that can help your messaging look professional and appealing are appropriate images, changing typography and maximizing white space to help the eye navigate through your piece. Consider images that are relevant, have a clean look and feel and evoke the emotion necessary to communicate your overall theme.

Typography changes can help call out information and note important highlights. However, you should avoid using more than three different types of font faces and colors in one piece. Most businesses carefully choose typefaces and a color palette as part of their brand image. Be sure to consistently incorporate these elements in order to stamp each communication sent by your firm with your firm's overall brand persona.

### 4. Show that you understand

Anytime you talk to a prospect, you want to express that you understand their interests, needs and wants. You also want to show that you can deliver on their expectations.

In order to demonstrate that you have a real understanding, begin by communicating in a way that your reader can easily understand and appreciate. Your referral sources, peers, clients, prospects and various industry subsets expect you to speak their language. Much like a waiter will speak abbreviated "kitchen lingo" to the chef and then turn around and deliver an elaborate menu description to his customers, you too should use common language in order to effectively communicate that your firm's solutions will meet their needs.

The process of soothing pain points begins with understanding your target markets and identifying their struggles. You can then provide needed information and resources that lend solutions to these problems and showcase the level of expertise (and understanding) that you possess.

Your communications should always offer valuable information in the form of whitepapers, invitations to events, periodic offers for free consultations and other meaty tidbits that keep readers coming back to you as the go-to-resource for what they need. You can also nurture your existing clients with privileged information "for our clients' eyes only" and even provide long-standing, loyal clients with "inner circle" benefits or rewards.

### 5. Convert your prospects

If you want a follow-up meeting, it never hurts to ask, "Do you want to meet next week?" The bold and confident may take it a step further by saying, "I'd like to get together with you again this Friday. What time works for you?"

When you seek to expand opportunities through your email marketing efforts, you have to pose the question. This will come from your Call To Action (CTA).

CTAs direct your readers to your website through links to additional information, event registration forms, whitepaper download forms and other resources. CTAs can also specifically ask your readers to contact you for more information or for a free consultation.

Another way to warm prospects up to the thought of a second interaction is to put things in their court. Make them feel more comfortable by letting them choose when and how often they hear from you again. Many digital marketing platforms offer user preference centers where your subscribers can determine whether they want communications sent to them weekly, bi-weekly or monthly etc. Preference centers can also be set up to allow your subscribers to choose what kind of information they are receiving from your firm.



**Social media offers the perfect platform to highlight your firm's culture, people and expertise in a personal, engaging way.**

Keep existing clients engaged in your firm's activities and always thinking about you through the use of appointment reminder messages, deadline reminders, news about changes in laws or guidelines relevant to them and general firm news and updates.

Whether your contacts are clients or prospects, you can help them look forward to the next step in your relationship by letting them know what is on the horizon. Keep a "coming soon" tone in your messaging by noting what readers can expect to find in your next email newsletter.

### How Email Fits Into Social Media

Letting others find you on their preferred social network will help your business get personal because you will be publicly demonstrating that your business is relatable and accessible across multiple platforms. Beyond the relationship factor, consistent branding across multiple platforms helps strengthen your brand image as well.

Your firm can capture additional opportunities to reach clients and nurture prospects when you flow your email communications through your social media channels. Some of your contacts may prefer Facebook, some will prefer Twitter and others might prefer LinkedIn and so on.

Each individual learns, receives information and processes information differently. If a prospect or client goes looking for you on their preferred channel and cannot find you, there is a measure of disappointment associated with that inaccessibility.

The good news is that social media platforms offer free, additional exposure for your communications as well as opportunities to warm up prospects, capture leads and convert prospects to clients.

Additionally, social networking presents a valuable opportunity for your firm to gather an up-to-the minute understanding of what your prospects, clients, peers and others are discussing related to your various practice areas.

Do a bit of research to find out where your prospects are likely to be congregating online prior to establishing a presence on multiple networks. Read the terms and conditions associated with your chosen networks and be prepared to comply with these terms. Align your social media communications and strategies with your existing editorial calendars and marketing goals.

Once your platforms are chosen and established and goals are aligned, employ social media management tools to help simplify and streamline the communication of your online marketing messages across multiple platforms.



## How to Flow Your Email Content Through Multiple Channels

Your email communications can find new life when shared across multiple social media platforms. Just one article or email blast could take on several different incarnations on your social networks, and this helps you maximize the effectiveness and reach of each of your email messages.

### Post it to your blog

Content utilized for your email campaigns is likely to be of interest to your blog followers, so why not post it to your blog? Conversely, blog posts can be an excellent source of content for your email marketing efforts. When posting to your blog, follow some of the same personalization techniques as you would for your email campaigns. It is also important to include an image with your blog post. Images help boost engagement with your readers as well as garner more attention when a post is shared on various social networks.



Repurposing your email content on social media channels adds shelf life to your materials and increases your firm's visibility.

### Vlog about it on YouTube

Your email content and blog posts can easily be transformed into short, engaging videos. YouTube videos do not have to be a high tech undertaking in order to be effective. While you're planning out your next video, keep in mind that your viewers will want you to keep it short (less than two minutes is best).

Don't be afraid to be yourself. Online marketing truly gets personal when your contacts have the opportunity to really see you in action. Be sure to write out a script highlighting the key points of your original message using everyday language to express your view on these important points. Once you have your final product, post your video content to your YouTube business channel. Be sure to use an engaging thumbnail image associated with your video and upload your script as your video transcript. Including video transcripts can enhance the search engine results associated with your video.

Another way to boost your video's searchability is to include relevant keywords in the title. Be as descriptive and keyword-rich as possible (for example: "College Savings Plans: The 529 Plan and Your Child" or "What I expect to get out of the next Payroll Marketing Conference and why"). If you are creating a video related to a conference or event, list the exact name of the event in order get found among the related online conversation.

Once your video is posted, don't forget to remind your channel subscribers that you have new video content. You now have brand new content that can be shared across all of your social networks.

### Post it to Facebook

If you choose to have a Facebook presence for your firm, it is relatively simple to share your email newsletter or email blast content on your Facebook company timeline. Most email marketing platforms offer social media sharing links that you can use to share your messages with your fans. Here are the steps to follow when sharing your email message on your Facebook timeline:

- Click on the status update field on either your Home or Timeline view.
- Paste your email's browser view link into the status update box.
- You can type over the link and add any comments you may have related to that message .
- You can modify the post title or summary text by clicking on it, and a text box will appear for editing.
- Choose which image you would like to appear with your post (if images are available) by scrolling through the Choose a Thumbnail options.
- Choose to omit an image by checking the No Thumbnail box.





Color visuals increase people's willingness to read a piece of content by 80%. Match your content with vibrant images when posting on social media.

- Click the blue Save and Post box to immediately post your message.
- Schedule your post for a future time by clicking on the blue clock icon in the lower-left corner of the Status window and then scroll through and select the year, month, day, hour and minute that you want the post to appear on the Timeline.
- Scheduled posts can be saved by clicking the Schedule button.

#### Tweet about it

If you are represented in the Twittersverse by a company Twitter account, you can easily share your email content to this social network as well.

The 140 character limitation requires some creativity with your tweet. Provide a link that followers can click on to get the whole story on your email, blog or website landing page.

It is also helpful to use #Hashtags and keywords so that your messages can be easily searched and found.

Here is how you compose a Tweet utilizing email content:

- Click on the blue Compose New Tweet option in the upper-left corner of your Twitter account.
- Compose a short message related to the link you are sharing.
- Paste your message's link into the Compose New Tweet window.
- Include relevant hashtags (Twitter recommends no more than two hashtags — more than two may appear "spammy").
- Click the blue Tweet button to post your Tweet.
- Tools like Checkpoint Marketing for Firms Social Media Solutions Social Media Manager can help you schedule your company's Twitter messaging.

#### Link to it through LinkedIn

As the largest professional network worldwide, LinkedIn provides an excellent opportunity for companies to share information of value with their clients, prospects, referral sources and peers. LinkedIn's link sharing functionality is much like Facebook's. But, unlike Facebook, this network offers the additional opportunity for users to target their posts to reach relevant audiences — eliminating the need for niche presences on this network.

Here's how you can share your email communications on your LinkedIn company page:

- Navigate to your company page.
- Click on the Attach a Link option in your Share an Update field.
- Paste your link into the field and click the blue Attach button.
- If you would like to modify the post's title or summary text click the blue Edit option available at the bottom right of your summary text, and then text editing boxes will appear.
- You can choose to share your post with All Followers or a Targeted Audience.
- Targeted audience options include employee vs. non-employee, company size, industry, function, seniority and geography (your LinkedIn company page must have at least 100 followers in order to utilize the targeting feature).
- You can preview your message or click the blue Share button to post your message.
- Checkpoint Marketing for Firms Social Media Solutions Social Media Manager can help schedule posts to LinkedIn.





## How are You Doing?

### Measuring Engagement Using Metrics and Reporting

You will get the most return on the time and effort you invest in your social media marketing when you use metrics and reporting tools to track your progress. It is vitally important to measure engagement in your email marketing efforts as well as on all of your social networks.

Keeping on top of your metrics and sharing the related reporting with your marketing team is like keeping the online marketing romance alive. You'll want to set up a date night — that is, a reminder to periodically check your email and social metrics and generate reports. Be sure to stick to your date night — come rain or shine — in order to keep your relationships thriving and connected. Your social metrics are the key to understanding what is working and what is not working in your online relationships.



The real-time nature of social media has changed client expectations. Be responsive to inquiries. According to an Edison Research Study, 42% of consumers expect a response in under an hour, 25% in the same day and 9% want a reply within five minutes.

It's also important to listen and respond to active conversations. When it comes to personalizing your email approach, following up on your email click activity is an important part of the process. Perhaps you have noticed that a business client is actively reading email newsletter articles related to succession planning. You could flag that client in your database as a succession planning prospect and either drip out additional targeted succession planning messages, have your partner in charge of succession planning contact that client or contact the client after he demonstrates an additional response to the targeted messaging. Often times clients may not be aware of your additional service offerings and responsiveness to your email click activity can ensure that a client will stay in-house instead of seeking out additional services elsewhere.

Check in on your email metrics about three days following each launch to determine the effectiveness of each campaign. Establish baselines for your firm and continually seek to improve engagement on your campaigns. Good numbers will indicate a great date and will ensure that there are many more dates to come. Poor numbers may indicate that you need to step up your game and tweak your approach. You should also have a monthly report that shows an overview of all of your email marketing efforts.

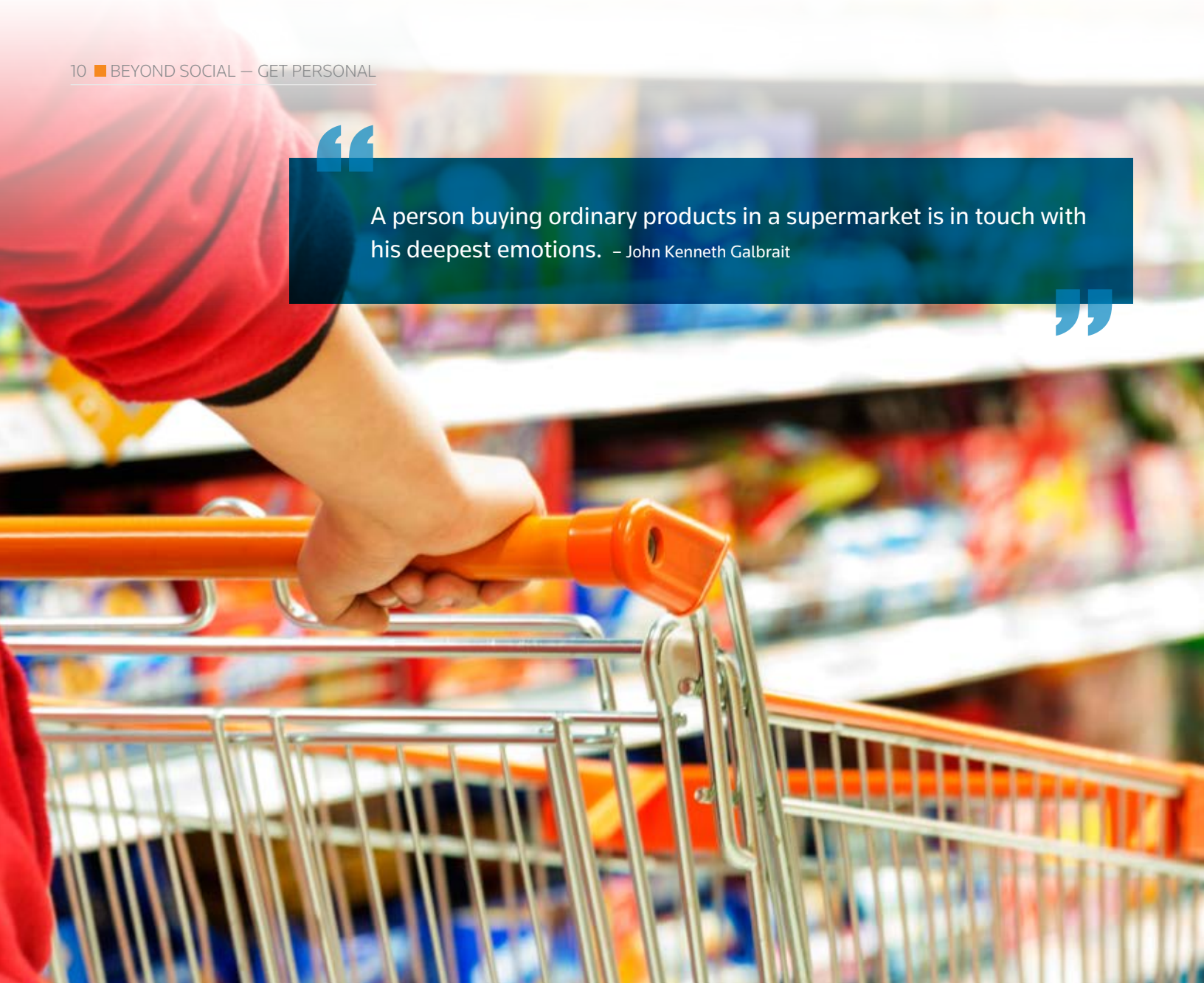
Responsiveness in your social media marketing begins with responding to all public posts or private messages and continues to grow and develop when you demonstrate an ability to tap into your metrics and tweak your social messaging accordingly.

With the combined arsenal of an active social media presence, a personalized email marketing approach, responsive online marketing tactics and routinely monitored metrics, you will be well-armed in the battle for your prospects' attentions and admiration.

Checkpoint Marketing for Firms Social Media Solutions Social Media Manager can help you get a clear picture of your online marketing efforts' performance in a clear, concise way. For more information on reporting, email marketing reporting, metrics and follow through are covered extensively in our whitepaper, *Play Doctor with Reporting and Metrics for Healthy Business Growth*.



A person buying ordinary products in a supermarket is in touch with his deepest emotions. – John Kenneth Galbraith



### Online Marketing is a Lot Like Courtship

Personalizing your email marketing is an important part of keeping your subscribers engaged. Targeted marketing ensures that you are courting the right audience and not boring your contacts with irrelevant information. Personalizing your email campaigns also helps reduce unsubscribe rates, boost click activity, increase referrals and grow your subscriber list. Your clients and prospects will think of you first when your messaging consistently provides value and appeal.

Additionally, the perceived accessibility, relatability and credibility of your digital marketing messages is improved when prospects, clients and others can find your messaging across multiple social media platforms. You will build relationships when you are tapped into (and responding to) the needs and concerns of your audience. Reporting and metrics help you listen and respond to your fans and followers.

Continuously woo your prospects and work on strengthening relationships with existing clients in order to achieve maximum results from your email and social media marketing efforts.



## About Checkpoint® Marketing For Firms

Drawing on the expertise and resources of Thomson Reuters, Checkpoint Marketing for Firms offers comprehensive marketing and client communication solutions designed to help accounting firms, law firms, community banks, PEOs and payroll service bureaus achieve their client retention and revenue goals.

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