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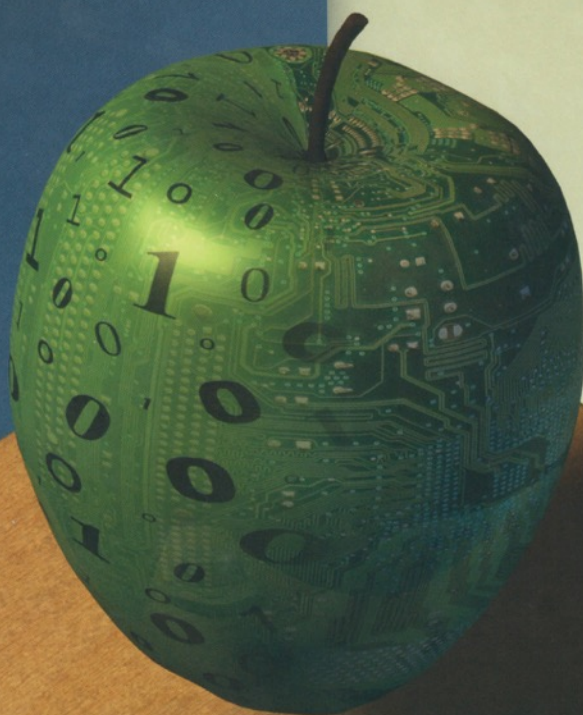
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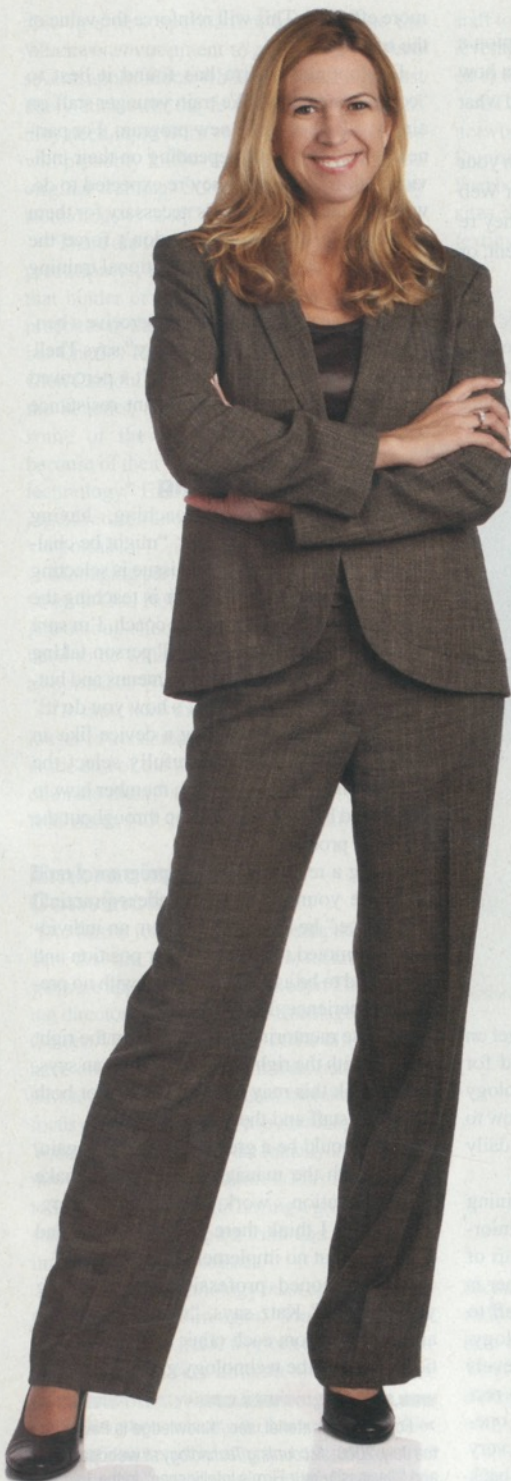


A SPECIAL COVER PACKAGE

Tech & Partners

Michelle Golden of
Golden Marketing





Charting A Firm's Social Media & Communications Policy

Most professionals might lack a full understanding of the business applications of social media networks.

By Michelle Golden

Rare is the firm that hasn't yet addressed controlling Internet usage, text messaging, instant messaging (IMing), and other forms of communication. This topic can quickly become heated, with some partners feeling very strongly that most, if not all, Internet activities are unproductive. A couple of comments like "Chris is checking Hotmail" and "Pat is on Facebook," and it isn't long before a policy is issued:

Access banned to third-party e-mail Web sites, instant messaging, blogs, and all social media sites. The Internet is to be used for research only!

What's Behind the Policies?

This article is inspired by a session of 40 managing partners that I led. In small group discussions, each table of managing partners separately explored two questions: one intended to provoke discussion about the depth of management's knowledge, and the second to explore why many are so uncomfortable with the practices.

The first question was, "Do you and others who manage your firm have a strong understanding of these technologies (IMing, texting, LinkedIn, etc.) and their application to the way you do business?" Exploring the first question brought to light the realization that these partners and the partners back in their offices

didn't, in fact, know much about the potential business uses of these communication tools. They had questions of their own: What are they? Why should we care?

The second question was: "What factors do you think contribute to a lack of comfort in firms with these forms of communication?" It's fair to say people don't agree as to the effectiveness of various forms of electronic communications. Much of this difference can be attributed to lack of experience with the tools. The group was hungry to know how these tools could help their firm. More importantly, they realized the error in creating policies before fully understanding the answers to this question.

Contributing to Discomfort

The group identified several factors contributing to the lack of comfort:

1. **Fear of the unknown:** lack of knowledge and understanding.
2. **Professionalism:** Is it unprofessional? What image does it send?
3. **Perceptions of waste:** "unproductive" time; business vs. personal.
4. **People skills:** Are people skills underdeveloped when they communicate this way?
5. **Legal concerns:** liabilities and risk mitigation.

The first three, it was determined, could be solved through education. For this I strongly recommend engaging your team members to do the teaching. The fourth item might require some awareness training and preventative strategies. More interestingly, this is already considered an issue with e-mail in daily business use. Our collective experiences with the diminishing communications skills observed since e-mail's introduction is probably a big part of this concern.

Legalities will always be an issue. Audit trail, risk mitigation, and processes to ensure quality control are realities the profession must address. Our advice is not to consult lawyers who are timid about social media, but utilize lawyers knowledgeable and not fearful of emerging technologies.

Personal Comfort Level

Two facts became evident in this group. First is that communication-style preferences were as disparate among each small table at this session as would be found among entire organi-

zations crossing four or more generations. Second is that concerns were highest in regard to appropriateness in the use of these technologies with clients. These are related and both tie to what we, as individuals, believe and prefer in our own communications: all of this is experience-based. An ah-ha moment was when the group recognized that it isn't such a "generational" issue after all, but simply a matter of personal comfort, or lack thereof, with each technology discussed.

From our experiences with e-communications we've embraced, we witness the all-consuming nature of e-mail and the disconcerting sense of urgency that comes with it. As we've gone from wired to wireless, our new-found ability to work anytime/anywhere enables most

Instead of banning the 'unknowns' of IMing and texting, ask for insight from the experts.

of us work odd hours whether we like it or not. With this flexibility and heightened level of access, we can suffer the stress imposed by a constant sense of urgency. We often forget selectivity is at our discretion. This urgency is self-imposed; it isn't universal. Some people, particularly younger people who have always had e-mail, don't seem as enslaved to it as the rest of us.

That we perceive urgency differently is a fact we need to contend with when discussing policies. Don't assume everyone agrees that an e-mail means urgent and a telephone call does not. Discuss "urgency" in your firm and talk about it with each of your clients. How will you know when something is urgent? Urgent shouldn't be the default.

We should individually convey to one another the way we best like to be reached. Some of the managing partners were quite concerned that their team members sometimes text-message clients. I have a couple of clients I was surprised to learn actually prefer to be reached

this way. There is only one person who should dictate how you reach a client. The client! Do you ask each client, indeed each individual you talk to within a client's organization, how they prefer to be reached? Mobile? Home? E-mail? Text? Should this not be a matter of course with every new client? The individual's answer is the correct way. No policy can or should override that.

Focus on Judgment

When addressing texting and instant messaging, think about a 25-year old. He or she was a first grader in 1990, and they got through high school and college texting/IMing friends for homework help and reaching people, or being reached, anytime, anywhere. They've always been extremely connected, even silently, to a vast network of people. This is the power of social media.

To the under-30 crowd, texting and IMing are valid and useful tools, not simply entertainment. To restrict the use of these productivity tools is absurd in their eyes, just as restricting our generation's telephone or car would be in our eyes.

Remembering that a key cause of the discomfort with something new is fear of the unknown, the answer is found in education. The best source of education may be right under your noses. Instead of banning the unknown, ask for insight from the experts. Engage your team members in the following ways:

1. Invite them to educate the rest of the firm: "Teach us about these technologies, and give us specific ideas about their business applications."
2. Ask them to anticipate concerns those less-familiar will have, and to address them with good evidence or policy recommendations.
3. Let them create "best practices" and create a subgroup to stay on top of emerging technologies.

No one likes to be told what to do, especially people who generally demonstrate good judgment. Laying down blanket policies tends to offend your best people more than it controls the folks with poorer judgment.

When it comes to policy, if someone repeatedly exercises poor judgment, you've made a hiring mistake. No policy on telephones, Internet, or even dress code is going to fix that.

Cover Package: Tech and Partners

Open conversations and ultimate dismissal may be the only real solution for the small percent of the population in whom judgment is lacking. The rest of your team deserves better.

Establishing Your Policy

Your intentions behind your policies are most likely very honorable: the work gets done, clients are happy, the firm stays reputable. There may be others. List them out. These will be your firm's priorities that should be pretty universal no matter what issues your firm is facing. If you have articulated firm values or

worked through the mission/vision process, these documents may also be excellent starting points for assuring that your intentions behind your final policies are aligned with the firm's overall objectives, and stay that way as you and the business world evolve.

Next, undertake a process like our session and invite people at various levels within the firm. Engaging people across the board when establishing policies is the very best thing you can do to create a strong, non-dictatorial culture.

It also saves the firm tremendous energy to set broader policies than narrower ones. For

instance, try to create an overall communications policy that encompasses letters, memos, e-mails, speeches, articles, blogs, text messages, and forms of communication that haven't yet emerged. **PA**

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The Social CPA

Social-networking sites are mushrooming. Here's a breakdown of the current favorites. **By Roy Keely**

Roy Keely, marketing director of Xcentric, offers this rundown of social-networking sites for CPAs:

■ **Twitter:** Grew by more than 1,300 percent between February 2008 and February 2009, and another 77 percent between February and March of 2009. A form of micro-blogging, which is a blog where shorter, media, or link-based posts are encouraged. Largest demographic segment is between 35 and 49, which is vastly different from other social sites on the Web. Users subscribe to follow other people/businesses to see updates as they are rolled out. Microsoft has also rolled out ExecTweets that allows users to follow popular CEOs and other executives. If you are a CPA firm you should sign up for Twitter, regardless of whether you're going to use it, because you can get the name you want.

■ **Facebook.** Now a household name in much of the world, and fifth in global Internet-traffic rankings. CPAs are beginning to use FB as a recruitment tool rather than a revenue generator. Eventually will



turn into a marketing channel. Start a Facebook page for your firm and let someone who is going to be onboard a few more years run with it. Proceed knowing that one day it might very well be one of your top lead-generation tools.

■ **Blogs.** Becoming increasingly popular as a means to disseminate information. There are many blog platforms: Blogger (blogger.com, free); WordPress (wordpress.com); and TypePad (typepad.com).

■ **MySpace.** Has a strong following and ranks eighth in worldwide traffic, but not much obvious use for CPAs right now. First to market on a significant scale, it's become the social-networking site known for music.

■ **Meetup (meetup.com).** Mission is to "revitalize local community and help people around the world self-organize."

■ **Affluence (affluence.org).** Social networking for the affluent, where you can be involved in exclusive parties and other red-carpet events. To qualify, you must be worth more than \$3M, have an annual household income of \$300,000 plus, and have five friends to invite who also meet the criteria.

■ **Yelp (yelp.com).** Allows peer reviews of Web sites and other business establishments food-related. Also acts as a guide to businesses in local markets, so CPA firms should be listed. **PA**