

# **The Accountant's Social Media Handbook**

By Becky Livingston

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The Accountant's Social Media Handbook by Becky Livingston

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# 01 PREFACE

In today's world of CPA firms, marketing has taken a leap from the back seat to a seat at the strategic table. With more and more firms focusing on marketing efforts, it makes a CPA wonder, "How does my firm continue to stay ahead of the curve to attract clients and to move the firm higher on its journey to increasing lead generation?"

Marketing is one solution.

According to the *2015 Hinge Marketing Report*<sup>1</sup>, where over 530 professional services firm professionals were surveyed, there were five marketing initiatives that firms were focusing on to compete for clients, including:

1. Generating more referrals;
2. Increasing visibility of the firm's experts;
3. Making existing clients more aware of the firm's services;
4. Increasing the firm's brand visibility; and
5. Implementing a content marketing program.

To assist them in every effort are social media and digital marketing. Social media has allowed firms to expand their reach to new prospects within industries, geographic regions, and new target markets. It has also provided them with a platform or stage

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<sup>1</sup> Top 5 Marketing Initiatives for Accounting & Financial Services Firms.

<http://www.hingemarketing.com/blog/story/top-5-marketing-initiatives-for-accounting-financial-services-firms>



to communicate with audiences interested in their products, services, corporate governance, and firm culture.

Digital marketing has helped to increase touch points with existing clients and leads unlike anything in the past. Just think about the leads a firm gets when people download a whitepaper, refer a new client through an email drip campaign, or sign up to receive tips and tools they can use to do increase their internal control efforts, while reducing risk.

One thing to keep in mind is that these new media offer you a chance to provide a value add to your clients.

### **The State of Social Media in the CPA Profession**

In the past, potential clients leaned heavily on a personal referral for a professional service provider, such as an accountant or CPA. Things, however, have changed greatly over the past decade. More and more people are doing research about firms before making their final decision. They want to know more about your firm's culture; how you're addressing current trends within their industry vertical; and how relevant your firm is within a particular service line.

How are they conducting this research? Through search engines and social media, which gives everyone a chance to investigate, research, and monitor what their top three firms of choice are doing.

In fact, according to the *Top 10 Marketing Techniques for Professional Services*<sup>2</sup>, 80 percent of potential clients used online resources compared to 55 percent who used traditional references.

In many cases, firms that use marketing as a strategic powerhouse, are those specializing in an industry or niche market, and who use the social media and marketing tools common within those industries to reach their target market.

Even regulating bodies, such as the Securities and Exchange Commission (SEC) and Financial Industry Regulatory Authority (FINRA), have begun to appreciate the power of social media and how it may be applied in the profession. In fact, FINRA Regulatory Notices 10-06 and 11-39 address social media use within firms specifically.

This book was written to help you address the strategic marketing initiatives for your firm, focusing on social media and digital marketing. In an effort to help you create a strategic plan, there are many activities, check lists, and tips to help you along the way.

As a professional services firm marketer, including firms such as KPMG, the AICPA and CPA.com, plus my own company's CPA clients, my goal is to help you to develop a strategic marketing effort that aligns with your budget—no matter what that amount may be.

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<sup>2</sup> Top 10 Marketing Techniques for Professional Services

<http://www.hingemarketing.com/blog/story/top-10-marketing-techniques-for-professional-services>

In the following chapters you will be exposed to statistics, case studies, best practices, and a lot of activities to help you find the right approach for your firm.

Consider each chapter as a stand-alone element or work your way through the book.

## **ABOUT the AUTHOR**

Becky Livingston has over twenty-five years' experience in marketing and technology in financial services and engineering firms. She is the President and CEO of Penheel Marketing (penheel.com), a boutique marketing firm specializing in social media and digital marketing for CPAs. In addition to being a marketing practitioner, Becky is also an adjunct professor, author, and speaker. With a graduate degree from Pace University in Information Systems, Becky also holds undergraduate degrees from two other colleges and also has a Certificate in Corporate Training from NYU. She is also an active member of the Association for Accounting Marketing.

Connect with Penheel Marketing on Facebook, LinkedIn, Google Plus, Pinterest, and YouTube.

# 02 INTRODUCTION TO SOCIAL MEDIA

Successful social media marketing requires a deep understanding in how consumers and businesses use each of the major social networking platforms. Each platform provides different functionality and limitations. Understanding effective tactics to maximize the potential each platform holds are essential in the effective implementation of your social media marketing strategy. This chapter offers an overview of the current, most important social media platforms – Facebook®, Twitter®, LinkedIn®, YouTube®, Google Plus®, and Pinterest®.

It focuses on:

- Deciding which platforms are most important for your business to focus on depending on your target market;
- Understanding the basic functionality, restrictions, as well as recommended tactics for each site; and
- Best practices for maximizing the marketing potential of each platform through examining case studies.

Is your firm set up for social marketing?

Take five minutes to complete the checklist below to make sure you've covered all the initial basics before getting started with social media marketing in your business.

The more items you check, the better prepared you are.

- ☐ My firm has clear goals for social marketing?  
Be specific and keep the objectives in mind when developing initiatives for your firm. It's important to understand the firm's brand, its marketing methodology, and how the staff will execute the initiatives to meet goals and to measure metrics.

- ☐ We have the human resources to commit to social marketing.

Before you begin, know this is a commitment, something that has to be managed, executed, tracked, and measured. It's about real-time response in some instances, and requires frequent if not constant updates.

- ☐ We produce quality content that will sustain our social conversations.  
Content is what the social media platforms are all about. Review the content you may have. Identify what you can use in the "now" and what may become re-purposed content that may be used over and over. Put a plan in place to produce content, like blogs, video, checklist, how-to's, graphics, and more.

- ☐ We know which social media sites are popular with our target market.  
You must know this before you begin or you'll be wasting precious time, energy, and resources trying to figure it out. Spend the time up front to identify the social platforms where your "people" spend time.

- ☐ Our website is prepared for social and mobile interaction. Make sure your website is ready for the social media attention it will soon get. Consider the experience of using social media to land on a site that forces me to search for the content I seek. Users will not appreciate that.
- ☐ We are ready to leverage social media marketing in our buying process. Social media is not just about the top of the sales funnel. It may be incorporated into all levels, right down to the sale/conversion.
- ☐ We are committed to using social media in our marketing efforts. No matter what type of campaign you may be running, be sure to include social sharing and encourage relationship building.

### **How to choose?**

What social media platform is best suited to your firm? Choosing a platform is more than shooting a dart at a board or picking something based on a trend. A lot of thought must go into which platform you choose, why, and when you begin to mix in others to support your efforts.

I recommend that you choose one social media platform to begin with; do it well; and then move on to other platforms. If you choose to take on too much, you may begin to feel spread too thin and get frustrated when things don't work. In some cases, you may spend too much time "doing social," rather than focusing on growing the bottom line.

In addition to top social media sites, there are other social sharing sites that are great for firms, including:

- Vimeo™, and Vine™ [video]
- Slideshare® [presentation and document sharing sites]
- Instagram and SnapChat™ [photo and image share]
- Buzz Feed™, Tumblr™, Reddit™ [Q&A sites]

And methods:

- Blogging
- Commenting
- Bookmarking
- Podcasting

Social media is not meant to be a silver bullet. It's meant as a tool to increase brand awareness, to offer steps to lead generation, and to support your other online and marketing efforts.

### Activity

Choosing your social media platform based solely on trends will get you to spend more time and money than you may need. It's important to KNOW where your target audience is and who they are before jumping into any social media efforts. Any good social media or marketing person will ask you who your target audience is before doing any work for you. If he/she does not, that's a red flag.

Before choosing a platform, you must be able to describe your **ideal client or target market**. Use the note space below. The more you know about your ideal client, the better off you'll be at picking the right social media platform to start with.



Age range:

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Male /Female %:

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Where do they live:

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What are their hobbies?

---

How much money do they make?

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Do they have children? If so, how many / How old?

---

Where do they vacation?

---

Tell us more about your ideal client?

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What are your business objectives and the social media objectives to support the goals?

**Example:** Increase new clients by [%] within the next six months (April 2015) within [niche] industry.

Social Goal: Increase online exposure using social media platform [Name the Platform], to share information and tips about our firm. Post 3x / wk on this platform with engaging content and images and/or video.

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What is your monthly/annual budget to spend on marketing and social media efforts?

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## **What Social Media Are Best Suited for Your Business?**

According to Quicksprout® research<sup>3</sup>, 75 percent of people are somewhat likely to share content they like online with friends, co-workers, and/or family members. Forty-nine percent do it at least weekly.

In the same study, 86 percent of marketers stated that social media is important for their business. While 89 percent stated that increased exposure was the number one benefit of social media marketing.

In a video from Social Media Today<sup>4</sup>, Tania Yuki, CEO and Founder of Shareablee, says to "Begin with the end in mind." Some social media platforms lend themselves to driving specific goals, like driving traffic back to your website. Platforms like Facebook, Tumblr, Pinterest, and others are very good at that according to Yuki. To create community, Instagram and Pinterest are very good for that because they are visual platforms that help people to feel a connection through imagery.

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<sup>3</sup> [quicksprout.com/2014/09/05/what-social-media-platforms-are-best-suited-for-your-business/](http://quicksprout.com/2014/09/05/what-social-media-platforms-are-best-suited-for-your-business/)

<sup>4</sup> [youtube.com/watch?v=XxoMc7IjRFw](http://youtube.com/watch?v=XxoMc7IjRFw)

## Twitter

- 53 percent of businesses in the information and communication sector report the highest rate of blogs and microblogs usage
- 85 percent of B2B marketers use Twitter
- 50 percent of B2B marketers view Twitter as an effective social media channel

## Take-Aways

- Know the best day to Tweet (not Wed/Thurs)
- Tweet between 8 a.m. and 7 p.m.
- less than 110 - 120 characters (allows for ReTweeting)
- Use #Hashtags (< 3 per Tweet)
- Ask followers to ReTweet

## LinkedIn

Continuing with the Quicksprout data, LinkedIn is a business or professional platform. You won't be posting about the dinner you just had or the fun day you spent with your kids on this platform.

For B2B service providers, did you know that 65 percent of B2B companies have acquired customers via LinkedIn?

Forty percent of B2B buyers say LinkedIn is important when researching technologies and services to purchase.

Ninety-one percent of B2B marketers use LinkedIn for research, ads, sponsored posts, company page updates, staff updates, product promotions, and more.

### Take Aways

- Develop a campaign
- Create leads
- Cross promote
- Engage your audience

### Tip:

- *Regardless of what products and services your firm sells, create marketing offers, such as free demos, a free consultation, free ebooks, or special reports and share that information to generate leads from your LinkedIn company page.*

Additionally, you can create a marketing opportunity on this platform using rotating banners in the header area. Create a calendar of events or topics you want to highlight throughout the year. Then change the banner on the company page each month, quarter, or semi-annually. The banner image minimum size is 646 by 220 pixels; may be uploaded in PNG, JPEG, or GIF format; be a maximum of 2 MB in size; and be designed in a landscape format. Below is an example.



[Image Courtesy Fotolia]

## Facebook

Firms with visually-driven content should consider this platform because photos account for 93 percent of the most engaging posts on this platform, according to Quicksprout.

Further, 42 percent of Facebook fans like a page in order to get a discount or coupon. Thirty-five percent “Like” Facebook pages to compete in contests.

If that doesn’t make you think about this platform, remember 53 percent of social networkers follow a brand. Seventy-seven percent of B2B marketers have acquired a customer through Facebook.

### Take Aways

- Use the URL in the update rather than in the preview box and add a photo
- Post photos regularly
- Chat and interact w/ comments
- Run competitions if possible
- Post at least 2 updates / day
- Ask questions and join in with answers, sharing tips
- Be fun, helpful, professional, and engaging

If you want to view samples of the best corporate brands on Facebook, visit the Fan Page List at:

[fanpagelist.com/category/corporate\\_brands/](http://fanpagelist.com/category/corporate_brands/).

This list shares the firm’s rank, stats, followers, number of people talking about the brand, and more. You might be surprised to see who is in the brand top ten.

## Google Plus

Sticking with the Quicksprout research, Google Plus is the newest kid on the block and making quite a stir. In addition to having a visually-heavy platform, it is also directly tied to the world's largest search engine.

So, if getting your brand ranked on the top search engine while leveraging organic search—SEO—are important to your firm's leaders, then this platform is for you.

With nearly 350 million active users and 500 million total users, 20 million monthly mobile users, and an average daily time spend of 3:46 minutes<sup>5</sup>, this platform might be right for you.

Who visits?

- Millennials that visit each month: 28%
- Generation X that visit each month: 23%
- Baby Boomers that visit each month: 19%
- Older Baby Boomers that visit each month: 16%
- Golden Generation that visit each month: 15%

Sixty-eight percent of the visitors are male. If your firm has a large male-centric target audience, this platform might be right for you.

Finally, according to a 2013 study from Searchmetrics<sup>6</sup>, the growth rate of GooglePlus shares was approximately 18.5% per month, almost double that of Facebook (9.3%).

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<sup>5</sup> Digital Marketing Ramblings <http://expandedramblings.com/index.php/google-plus-statistics/>

## Take-Aways

- Leverage for exclusives
- Record video to share
- It's tied to other Google products
- Add to your social marketing lists
- It's great for niche audiences
- Aids in SEO

## Pinterest

Another relative new-comer to the social media space, Pinterest has made a great mark for itself. However, this platform does get the “rap” of being for women, when in fact many pin boards are dedicated to technology, cars, gizmos, hunting, camping, and more.

With nearly half as many users as Instagram, this photo pinning platform boasts 70 million total users, with more than 69 percent being female. Food is the top category, with “cheesy garlic bread” being the most pinned image on this platform. Nearly 57 percent of the platform’s users discuss food-related topics. Currently, Nordstrom is the most popular brand on this platform, with over 4.4 million followers.<sup>7</sup>

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<sup>6</sup> Press Release on Real Wire <http://www.realwire.com/releases/Social-sharing-on-Google-to-overtake-Facebook-by-2016-predicts-new-study>

<sup>7</sup> <https://www.pinterest.com/nordstrom/>



**Tips:**

- *Images containing a face get 23 percent more re-pins.*
- *The top brands in fashion and retail average 46 pins per image posted.*

Businesses with a target audience of moms, you'll find that 60 percent of the social traffic on this platform is from the home and furnishings categories. Also, moms are 61 percent more likely to visit Pinterest than any other demographic in the U.S.

- **Example**

*Because this platform is visited heavily by females, consider financial planning, personal budgeting, event-related tips and content you could share to increase traffic back to your website. Also, don't be afraid to inject some humor or "human perspective" into the brand pin boards. Think about weddings, college, and other life events. Use images associated with those life events with a description about tips for budgeting or planning. Then link those images back to your website blog, whitepapers, tips sheets, videos, etc.*

This platform allows pinners to place pricing on their images. The average product consumer spend on this platform is \$140 to \$180 per order. In comparison, Facebook spend averages \$80 per order, and Twitter spend is an average of \$60 per order.<sup>8</sup>

You may also post images without prices to encourage engagements, re-pinning, clicks to your website for more information, etc.

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<sup>8</sup> <https://www.quicksprout.com/2015/11/25/the-16-best-pinterest-tools-for-social-media-marketers/>

## YouTube

Though this isn't among the top-five social platforms we will focus on in this course, it is quite a force to be reckoned with. YouTube is owned by the largest search engine in the world—Google. It's tied directly to its search result tools and works in combination with Google Plus, Google Search, Google AdWords, and more.

In fact, 52 percent of consumers claim that watching product videos influences their online purchasing decisions. Of that number, 57 percent are less likely to return a product once they've viewed the video and purchased the product. Further, 44 percent of businesses in the information and communications fields have the highest multimedia content sharing website usage.<sup>9</sup>

### Take Aways

- Great for video placement and referral via link
- Lots of noise on this channel; hard to compete
- Most people know this channel, so when you say it's video, this is where they go.
- Millions of videos loaded each day
- Directly tied to the number 1 search engine in the world
- Could be too noisy there for your audience

Here is a great example of how to leverage video for your target market. Fit Small Business created a top list of the best YouTube channels for small business owners, including greats like Ted Talks and Tony Robbins, to lesser-known household names like

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<sup>9</sup> <https://www.quicksprout.com/2015/11/25/the-16-best-pinterest-tools-for-social-media-marketers/>

Behind The Brand and Startup Grind. Check out these top players at <http://fitsmallbusiness.com/best-business-youtube-channels/>.

According to Adelle Studios<sup>10</sup>, 92 percent of mobile video viewers share videos with others. Sixty-five percent of executives have visited a vendor's site after watching a video. When video is included in email marketing, click-thru rates increased by 200 – 300 percent.

More statistics include:

- 300 hours of video are uploaded per minute
- Home page videos are shown to increase conversion rates by 20 percent or more.
- 59 percent of senior executives prefer to watch video than to read text if both are available on the same page.

### **At A Glance**

We have talked a lot about social media platforms, their use, and demographics. I recommend reading additional materials to help you determine the type of platform the fits your business needs, and most importantly knowing your target markers' platform of choice.

The below chart is a snapshot of the platforms we've been discussing. The bullets may be used to identify the platform that

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<sup>10</sup> <http://www.adellestudios.com/top-15-video-marketing-statistics-2015/>

aligns with your target market based on the type of content media you will use.

	Facebook	Twitter	LinkedIn	Google Plus	Pinterest	YouTube
Photo	★	★	★	★	★	
Video	★	★	★	★		★
Article	★	★	★	★		
Text	★	★	★	★		

In addition to the type of media used on a platform, you must also consider the age demographic by platform. Here are some stats from the Pew Research Center, Full Screen, and Digital Marketing Stats<sup>11</sup> This chart will help you define the platform for your business by age.

	Facebook	Twitter	LinkedIn	Google Plus	Pinterest	YouTube
18-29	87%	37%	23%	29%	34%	18%
30-49	73%	25%	31%	51%	28%	26%
50-	63%	12%	30%	19%	27%	10%

<sup>11</sup> <http://www.pewinternet.org/2015/01/09/demographics-of-key-social-networking-platforms-2/>,

<http://www.fullscreen.com/2014/08/12/analyzing-youtube-demographics/and>

<http://www.statista.com/statistics/274829/age-distribution-of-active-social-media-users-worldwide-by-platform/>

# **MORE ABOUT BECKY LIVINGSTON AND PENHEEL MARKETING**

Becky Livingston has over twenty-five years' experience in marketing and technology in financial services and engineering firms. She is the President and CEO of Penheel Marketing. In addition to being a marketing practitioner, Becky is also an adjunct professor, author, and speaker. With a graduate degree from Pace University in Information Systems, Becky also holds undergraduate degrees from two other colleges and also has a Certificate in Corporate Training from NYU. She is also an active member of the Association for Accounting Marketing (AAM).

If you have questions about how to strategize, implement, measure, or report on any of the elements within the book, feel free to reach out to me. Also, if you would like a trainer for your team or speaker at an event, I may be reached at the following contact points:

Email: [Becky@Penheel.com](mailto:Becky@Penheel.com)

Website: <http://Penheel.com>

Twitter: @Penheel or @BM\_Livingston

Phone: 201-785-7840

Penheel Marketing is a marketing firm that specializes in social media and digital marketing for CPAs. In addition to strategic

consulting, the firm provides accounting professionals with marketing services, such as content development, blog writing, online advertising, website development, graphic design, copywriting and ghost writing, traditional marketing services, like print ad development, inbound marketing, search engine optimization, and more. Visit the Penheel Marketing website at <http://Penheel.com>, and connect with us on Facebook, LinkedIn, Google Plus, Pinterest, and YouTube for marketing tips for your firm

### **Published Books**

The Accountant's Social Media Handbook

SEO Secrets Myths and Truths to Being Found Online

### **Published Articles**

Too numerous to mention, but contributing author for:

AICPA CPA Client Bulletin

AICPA Resource Guide Marketing Tip

Massachusetts Society of CPAs *Sum News*

CPA Practice Advisor blog

PR New Media Training Guidebook

*Growth Strategies* 2014 editor and article contributor

InSource 2012 In-House Creative Services Industry Report

Harvard Business Review Reinventing Your personal Brand

*Accelerate: The Magazine* editor and article contributor

**Adjunct Professor**

Bergen Community College, New Jersey

Westchester Community College, New York

**Need A Speaker**

Becky speaks at a variety of business organizations and conferences throughout the year. See her speaking engagement list at <http://Penheel.com/Speaking-Engagements>.

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CPA Firm Management & Governance

CPA Firm Mergers

CPA Firm Partner Compensation: The Art and Science

CPA Firm Partner Retirement / Buyout Plans

CPA Firm Retreats: The Do-It-Yourself Guide

CPA Firm Succession Planning: A Perfect Storm

Creating the Effective Partnership: Two-Volume Package

Effective Partner Relations and Communication

How CPA Firms Work: The Business of Public Accounting

How to Bring in New Partners

How to Engage Partners in the Firm's Future

How to Operate a Compensation Committee

How to Review Tax Returns  
Implementing Fee Increases  
Leadership at its Strongest  
Passport to Partnership  
Professional Services Marketing 3.0  
Quantum of Paperless: The Partners Guide to Accounting Firm  
Optimization  
Sponsoring Women: What Men Need to Know  
Strategic Planning and Goal Setting for Results  
Tax Season Opportunity Guide  
The 30:30 Training Method  
The 90-Day Marketing Plan for CPA Firms  
The 90-Day Marketing Plan for CPA Firms – Streaming Webcast  
The Client Service Idea Book  
The Idea Book for Accounting Firm Hiring Managers  
The Radical CPA  
The Rosenberg MAP Survey: Annual National Study of CPA Firm  
Statistics  
What Really Makes CPA Firms Profitable?  
Winning Your First Client