

How to use Facebook to build your practice

By Carrie Kahn

Table of contents

Introduction	iii
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Leverage Facebook to build your brand	1
It's okay to get personal, but not political	2
Contributing in the community	3
A daily post can bring people together	4
Stay active and focused on your brand	4

How to use Facebook groups to stay focused	5
Why I choose to mix business with pleasure	5
Get organized with groups	6

14 tips for proper etiquette on Facebook	7
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How to manage your time in Facebook	9
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Carrie Kahn	11
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Introduction

While more and more accountants working in accounting and tax have a social media presence, many may not be actively using their accounts to develop business for their practices. Facebook, in particular, is baffling to many financial professionals who do not know how to use their presence to recruit more prospects and keep the clients they have.

Originally featured on Firm of the Future, this practical guidance has worked for author Carrie Kahn. Read on to see how these common-sense tips can help you use Facebook to increase your business as well.

Leveraging Facebook to build your brand

Facebook is a great place to find customers and increase your revenue. Social media is a great platform to develop and build your brand. You can also become known as an expert in your field by regularly contributing on Facebook. Insightful Accountant awarded me the Top 10 ProAdvisor® of the Year award for “Social Media Resources.” I will share my journey with you and teach you the secrets I used to make Facebook work for my business.

It's okay to get personal, not political

In order to build a strong brand, you need to stay connected with people that you wouldn't normally see on a daily basis. As you are building your brand, you want to think about how you want to be perceived by strangers. It is important to establish a good rapport. The secret is to build relationships by being authentic and contributing in the community.

Facebook posts can reflect your views and life's journey. There are many ways but the best is by trial and error. When scrolling through the news feeds, certain posts can evoke different emotional reactions. How did you feel during the election? When everyone was emotionally charged for one reason or another, to me, those posts were really tough to read. I had to learn how to scroll by, and in some cases, I unfollowed or removed friends from my list. It was really hard to resist the urge to add my comments, and I had to keep reminding myself that this isn't the effective way to do this.

You can become known as an expert in your field by regularly contributing on Facebook.

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Contributing in the community

It is important to understand that Facebook shouldn't be used just to sell stuff. You will quickly find that people will leave your group or unfriend you if all you do is share your latest promotion. Treat it like you would when you join a networking group or attend a social function. You don't walk up to someone and ask them to buy from you right off the bat. You have to get to know them first. You need to build trust by engaging with them so they get to know you. Once you do, the business will flow naturally.

I have so much to say and a great deal of expert knowledge on QuickBooks®. In order to build an image as an expert, I need to share my knowledge within my groups. I write blogs often and share them on Facebook. Whenever a client or partner asks an important question, I automatically think, "I need to write a blog about this." This way, I can share it over and over to help many others when they run across the same issue.

I recommend posting content once or twice a day. Make sure that the content is relevant to the group you are sharing it to and be sure not to post the same information over and over. You want to keep your audience engaged and active in your groups.

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A daily post can bring people together

A few years ago, I found myself really busy and was feeling overwhelmed. The stress was wearing on me and I needed to do something about it. I started walking every day before work to start my day right. This helped me to get my mind right each morning and organize my thoughts before the day takes over.

When I walked around our neighborhood, I saw things that reminded me of a big project I was working on. I was working to automate some of our everyday tasks to solve some major workflow issues. I knew it would take a team of experts to figure different aspects and solve this problem. As I cross a bridge, I would think, "Hmmm, bridging different people together to get the job done." I would create a post and add my thoughts from my walk. I always use the hashtag #morningwalk. I post it on Instagram so that I can use the fancy photo filters, and then share it to Facebook and Twitter.

I walked everyday for about a month and then stopped. Little did I know, my post was being followed. People were actually looking forward to my morning walk and I had no idea. Then, guess what happened? My friends reached out to me and let me know they missed my walk posts and they were checking in to see if everything is okay with me. They told me my posts inspired them to start walking and enjoy their neighborhood. Some even reported that they lost weight! I couldn't believe it...I had created a following. It was that moment that I realized my posts were making a difference and helping me build my brand!

Stay active and focus on your brand

Think of this as throwing spaghetti on the wall to see what will "stick." Keep an eye on which posts get the most attention and which ones get ignored. Everyone's friend list and feed is different. There isn't a set formula for what works. Try different groups and sharing new content. You want to make yourself stand out, and not just share information. Be active enough on Facebook to still balance your real life, while keeping in mind you are creating your brand.

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How to use Facebook groups to stay focused

Facebook is a wonderful place to make friends and connect with family, customers, prospects and colleagues. How do you communicate with all these people in one place? It can be really fun, but also confusing. Over the past few years, I have learned how important it is to create your brand through Facebook. If you want to use Facebook for business and building your brand, you should think before you post because it may impact people negatively if you are not careful.

Why I choose to mix business with pleasure

When I first started using Facebook, I used to have two accounts. I had one for my personal friends and family. Then, I had another one for clients and business associates. I struggled to keep the two worlds separate. Some of my work friends became close so I added them to my personal group. At times, I couldn't remember which account I was in and felt like I had a split personality.

Then, one day I had an epiphany. I realized I have become friends with many of my customers and would easily invite these people to something fun like my big 50th birthday bash, so why not have them be my Facebook friends? At the same time, I realized I really loved working with people who appreciated my skills and were fun to work with, so why not work on making sure we worked with people that I would be friends with in real life (IRL)? At that moment, I closed my "work Carrie" Facebook account, merged my friend list and have been growing my friend list ever since.

Think of Facebook groups as file folders to keep areas of your life organized.

Get organized with groups

Facebook Groups is one of my favorite features! This allows you to group people that have something in common. You can use the group to host discussions and share content that is relevant to that group. My family and friends do not care about the latest QuickBooks® special. So, I share that type of information only within my groups to let them know the latest prices and product updates.

The same idea works for family events. We have a family group on Facebook, so when I host a family party, I only want to share that with my target audience - in this case, the family I am inviting. Another cool feature is that I can see in the group who has read the post to ensure they all got the details for the party. Last year, my daughter and I went on a mission trip, and we created a group to share our experience with the attendees and the families who were watching from home.

Think of Facebook groups as file folders to keep areas of your life organized. When you think like this, you can effectively communicate within each group and not blow up your regular feed with things that your audience doesn't care about.

The best part about Facebook? It's free. Facebook groups are free. Give it a try!

14 tips for proper etiquette on Facebook

We all know the feeling we get when we see a nasty comment or negative post. Be careful not to be “that guy.” When I started using Facebook, I fumbled a few times. I learned by trial and error. I began to become aware of posts that completely made my day. These inspirational posts would give me a burst of energy. I also noticed people sharing negative posts or mean comments. The posts would derail my day and shake up feelings of anger. I had to learn how to protect myself and focus on the positive to have a better experience on Facebook. That is why I only share only positive posts.

Here are my tips for proper etiquette on Facebook:

Your reputation is on the line

Think about how you want to be perceived by strangers. Sharing some of your real life is ok. It helps people relate to you. Be careful to steer clear of emotionally charged topics, such as religion and politics. Facebook isn't the place where you are going to change someone's mind. Your Facebook friends are from all walks of life, and you will ultimately offend someone by clearly choosing sides in your Facebook posts.

Be nice!

Most importantly, always be nice. It sounds easy, but it is often forgotten. You know how your mom taught you to be nice to your sibling(s)? Continue the same level of respect towards others. We all have bad days, but resist the urge to post a RANT. Just stay off Facebook!

As you respond to a post, watch your tone, as the written word can be taken in an unintended way. Think of your words as a text. Texting is a brilliant way to miscommunicate how you feel, and misinterpret what other people mean.

Are you always selling? Stop!

Today, it seems like every other person has joined a new team and is selling. How do you feel when you see a post pushing a product that you don't want or need? Posting like this may annoy your Facebook friends.

Be helpful and collaborative

When someone asks a question, do not answer with “sending you a PM.” Think of this as whispering in front of someone. Often, several people are monitoring the post, waiting for the answer.

Engaging in posts

Engage in your friends' posts, especially close friends! It only takes a second to click “like.” Mutual friends will see your comments. If you skip over your friends' posts, it will be noticed.

Limit your posts

Sharing and posting several things, one right after the other, can be very annoying. Spread out your posts and keeping to once a day is even better.

Ups and downs of life

It is ok to share things that happen in your real life. Your friends will respond and lift you up. However, keep in mind it is best to limit one post. Your Facebook friends will notice if you keep posting about it. Facebook is not the place to do this.

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Photo albums

Facebook is a great place to post photos like a scrapbook. Take the time to edit your photos, and tell the story as you create your album. Keep in mind: don't be like a teenager and only post pictures of yourself; instead, tell a story.

Selfies

One area that adults do need a lesson from teens is on taking a selfie. They have it figured out. It's all in the angle. Do not take a photo from below your chin! You will see every wrinkle, chin hair and fat roll. Try moving your arm up at an angle that's more flattering.

Invitation or exclusion

Don't be that person who uses Facebook to brag about being invited somewhere at the expense of those friends who weren't. It makes your heart sink to learn that your friends got together without you. Be sure to be considerate when you post on Facebook.

Recipes!

How many times do you share recipes thinking they will save to your wall so that you can find them later? Hunting down recipes on your Facebook wall is painful. Instead, create a Pinterest account and save them there. Pinterest is a much more organized way to retrieve the images, and you can still share your Pinterest recipes on Facebook.

Missing person or pets

Take the time to make sure the person or pet is still MISSING! Keep your audience updated. These posts make people very anxious, and they want a happy ending!

Have fun and share with others

If you have a Facebook account, these areas are worth considering. Understand that friends, family, customers, prospects, employers, schools and others are reading your posts and comments. The way you use Facebook can help or hurt your reputation. Just have fun on Facebook posting positive and encouraging things, which will help others have a better day. Also, be real when you do need support. No matter what happens in your life, if you are kind to people, it reflects positively on you.

How to manage your time in Facebook

In order to manage your day and incorporate a great marketing strategy on Facebook, you must use your time wisely. It is important to share useful content and engage with people to leverage your opportunities. It takes time to build relationships. That doesn't mean you have to spend all day chatting on Facebook. I will share a few ideas to get the most out of your time online.

It's OK to be human.

Facebook can be incredibly helpful if you use it the right way. We all love posting pictures of our food, family and pets. By doing this, you are building a brand without even knowing it. Easy right? This allows others to relate to you and get to know you, and it is NOT a waste of time. In addition to sharing personal posts, you should begin to share valuable business tips to your audience if you are not already doing so. This will help your audience connect with you on a personal level, add value and strengthen your relationships.

Create group conversations.

Not everyone on your personal page wants to know your latest sale or promotion, or your long-term exercise journey. Create a group to share this kind of information to people who need it. If you do have a business and you want to use Facebook as a way to increase sales and grow, there are several ways to engage your audience for success.

You should create a Facebook group for a specific audience and moderate that group to keep it positive. Once you have your group, you want to post regularly

to keep the conversations flowing. Offer tips and tricks that are worth sharing. When one of these people have a need that you specialize in, they will come to you, as you have built yourself up as an expert.

You don't have to spend all day in your group. Share a blog post, respond to a comment and answer questions. If you do that a few times a day for 10 minutes, then you will see great results with little time invested.

Be selective of the groups you are in.

If you are in a group that becomes negative, sucks up your time or isn't giving you any value, it's ok to leave the group. Some groups may no longer be relevant to you. I recently noticed I was still in a parent group for my son's college that he graduated from, so I just removed myself.

With Facebook friends that are negative, or posts that aren't helpful or attack you often, unfriend or unfollow. It doesn't even matter if they are family or a possible client - you do not have to take the abuse. It seriously wrecks your mood and your day.

If you do that a few times a day for 10 minutes, then you will see great results with little time invested.

Value your time.

It is really easy to scroll through Facebook all day long, but it's counterproductive. Your boss will get annoyed, and you will not gain enough business to offset your time. Instead, set a time to "check Facebook." Perhaps morning, lunch and evening. Develop a routine and make sure it is something that makes sense for you. Ensure the ROI of your time is working, or you may just check once a day.

What I do is check through my news feed to respond to where I have been tagged. Also, I check to see if I have private messages. Look hard because if someone sends you a message that isn't a friend, it gets hidden in an "other" folder.

If you keep your posts positive and engage with your audience, you will create a following. When your Facebook friends have a question, they know who to ask if you have established your expertise in that area. Currently, I have an active Facebook group that I use for my partners to ask me product questions, which can lead to sales, instead of constantly posting links to my website. Group members ask for help determining which product they should buy. I promptly answer a solution and provide an easy way to order. Within minutes, I have a new sale.

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Carrie Kahn

Carrie Kahn, CEO of **Complete Business Group**, has been supporting and selling QuickBooks since Dos V1. She has been a certified ProAdvisor in the full line of QuickBooks products since 2002. Complete Business Group, joined the Intuit Reseller Program in 2008. In 2015 CBG launched the **Complete Business Partner Program** mentoring ProAdvisors in selecting the best QuickBooks products for their clients at best pricing for their customers. CBG was named Partner Program of the year for 2017. Carrie serves as a host for the ABBO Facebook group (accountants, bookkeepers, and business owners) as the QuickBooks product expert. She was named top 100 QuickBooks ProAdvisors every year since 2014. She was named top Social Media Resources ProAdvisor for 2017. She has been in the top 10 Intuit Premier Resellers (IRPs) since 2012, and currently is ranked #1 in the East. Carrie is currently serving on the IRP Council since 2016.

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