



# Using Social Media to grow your accounting firm exponentially

Tyler McBroom, CPA



# CPE Process

## In order to receive CPE credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

# Today's speaker



Tyler McBroom, CPA

Managing Partner - Measured Results, CPAs

Instagram: @tylermcbroom

Twitter: @tylermcbroomcpa

# Agenda

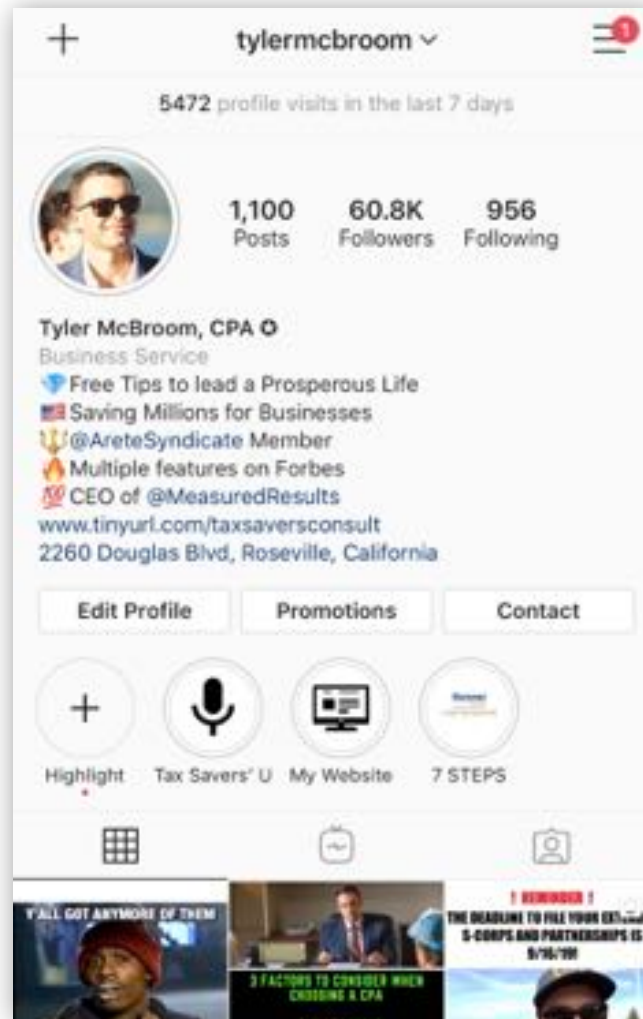
## Basics of Instagram

### 3 Cs of a Successful Social Media Strategy

- Content
- Community
- Conversion

### Q & A

# The basics of Instagram: Your profile



# The basics of Instagram: The feed



# The basics of Instagram: Instagram stories



FOR MORE TRAINING: Go to Facebook Blueprint and select the Instagram trainings

# So why Instagram?

## Launched Instagram efforts in October 2017

- First three months: almost no business
- January-June 2018: Averaged \$10,000 per month new business
- July-December 2018: Averaged \$40,000 per month





# So why Instagram?

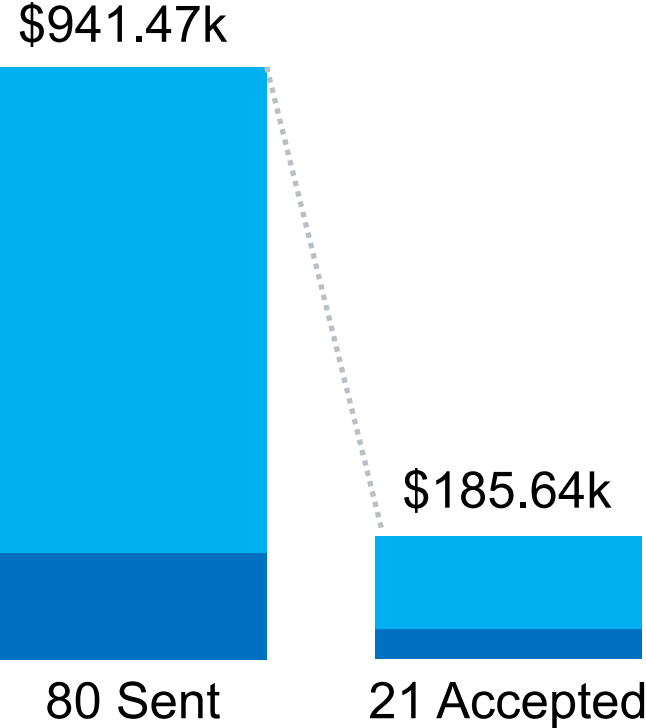
## Tax Season 2019

Averaged 5 new prospect calls  
PER DAY, over \$100,000 per  
month new business signed up




# So why Instagram?

Last month



Proposals sent in the last 30 days

Total Sent	Accepted Total
\$941.47k	\$185.64k
↑ 319%	↑ 180%



Who would like this kind  
of lead generation?

# Agenda

Basics of Instagram

## 3 Cs of a Successful Social Media Strategy

- Content
- Community
- Conversion

Q & A

# 3 Cs of a Successful Social Media Strategy



1. You need valuable **content**



2. You need to grow your **community**



3. You need to **convert** them to actual clients

# Agenda

Basics of Instagram

3 Cs of a Successful Social Media Strategy

- **Content**
- Community
- Conversion

Q & A

# How to create great content

## Getting Started

If you're not comfortable in front of the camera, practice making content about a hobby

This is how I started....





# How to create great content

## Content creation best practices

Don't talk about yourself


Solve a problem for your audience

Answer the questions your clients are asking you



**Time for an Exercise!**



A photograph of two young women with blonde hair in ponytails, wearing green hooded sweatshirts, talking outdoors. The woman on the left is in profile, looking towards the right. The woman on the right is seen from the back, looking towards the left. They are standing in front of a blurred background of green foliage.

Turn to your neighbor  
and tell them a  
problem you solve  
for your clients

#QBConnect | WiFi: QBConnect

# How to create great content

## Content creation best practices

Educate in the feed posts, tell your story in the (surprise) Stories section!

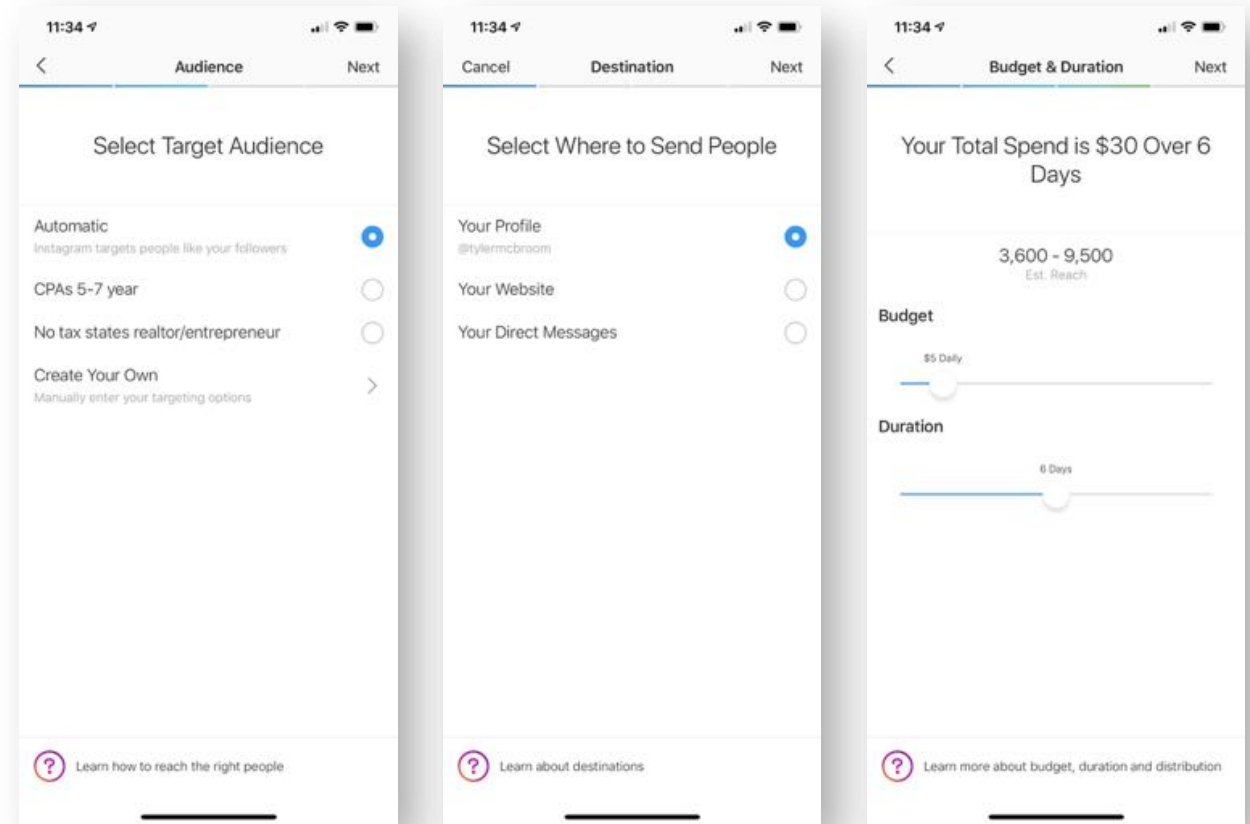


**Exercise:** Write down 5 topics that would educate your audience on the problem you solve  
(think about those questions they ask you!)

# How to create great content

## Content creation best practices

Boost posts that do well organically



# How to create great content

## Content creation best practices

Post Every. Single. Day. (Go all in or not at all)

It's ok to repost similar/repeat content, especially as your audience grows

**GIVEAWAY:** Before the end of the event tomorrow, create an Instagram feed or story post sharing something you learned from QuickBooks Connect. Tag me and use #QuickBooksConnect, 5 people will win a QuickBooks Jacket!

# Agenda

Basics of Instagram

3 Cs of a Successful Social Media Strategy

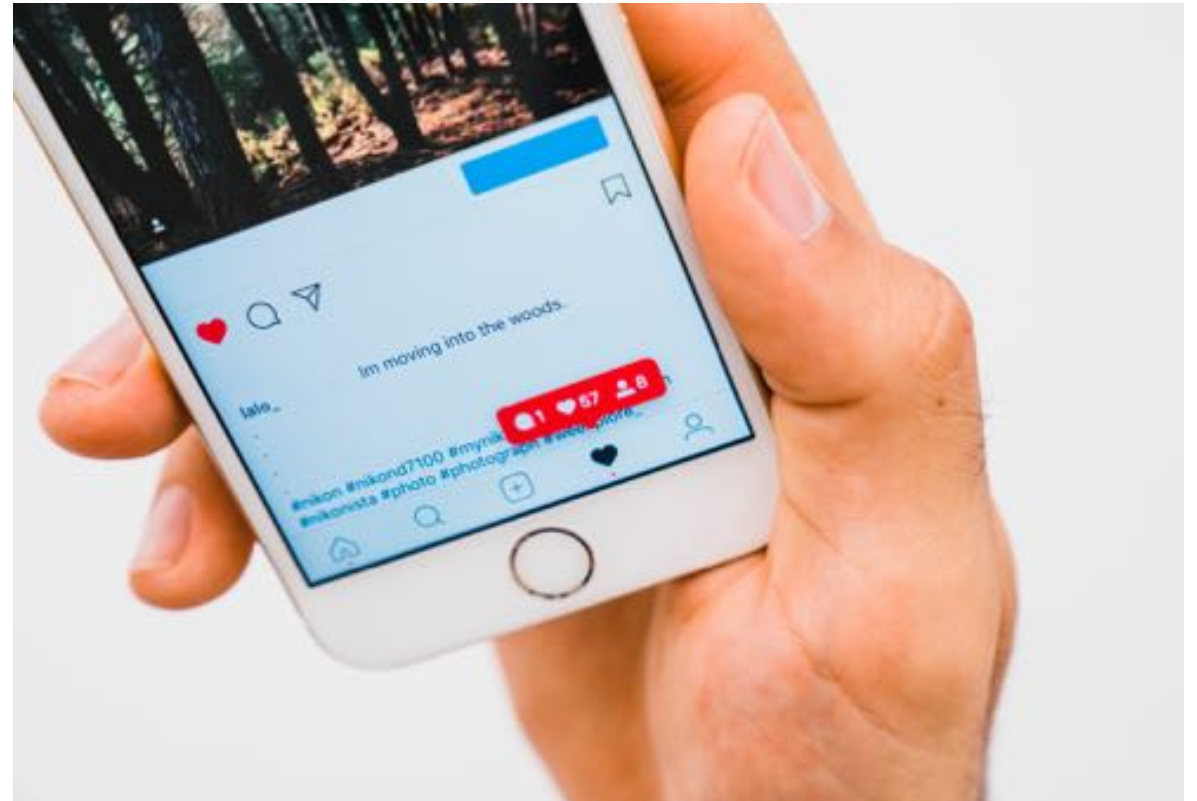
- Content
- **Community**
- Conversion

Q & A

# Building your community

Collaborate with others with similar size followings

Share each others' pages to your audiences



# Building your community

Using “Paid Shoutouts” to grow your following

Find accounts with large followings and pay them to share your page to their audience

Don't pay someone for guaranteed followers





# Agenda

Basics of Instagram

3 Cs of a Successful Social Media Strategy

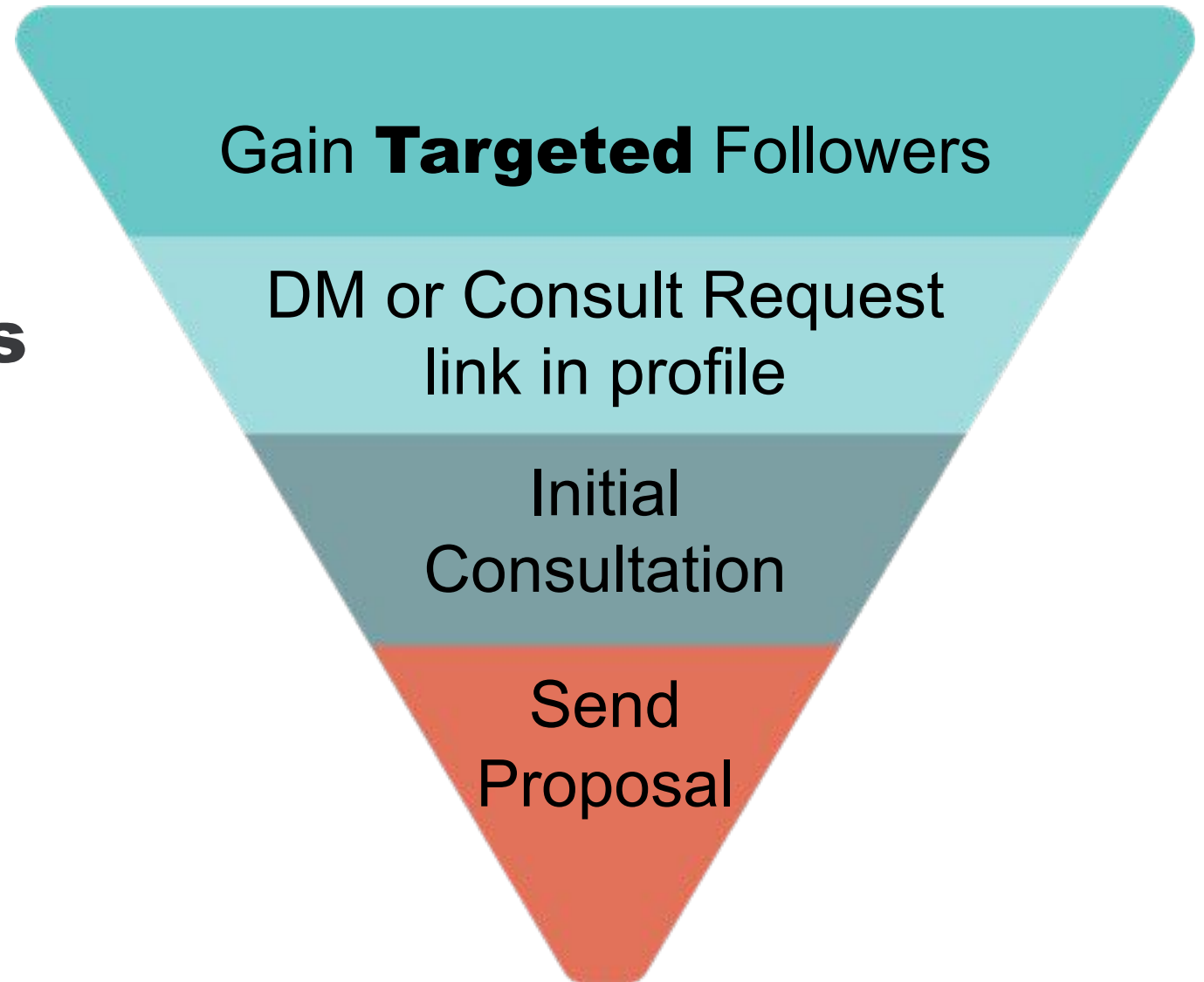
- Content
- Community
- **Conversion**

Q & A



# Converting followers to clients

How to “bring them  
down your funnel”



# Converting followers to clients

How to “bring them down your funnel”

Some content naturally makes people reach out

Have a couple go-to topics you can post multiple times (and use for shoutouts!)



# Converting followers to clients

How to “bring them down your funnel”

Capture their emails!

Email newsletter converts 10x better than social

Offer a free giveaway  
(Free webinar recording, etc.)



# Converting followers to clients

How to “bring them down your funnel”

The goal should be:

**Get them on the phone with you**



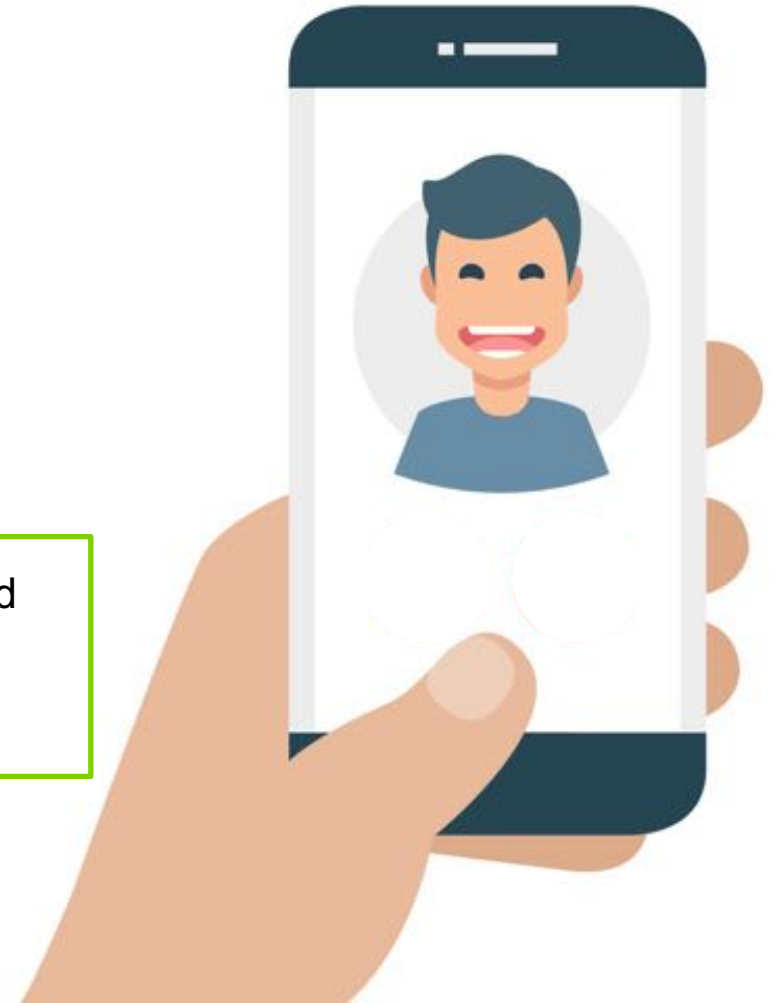
# Converting followers to clients

Servicing remote clients properly

Avoid the “long distance client” risk

Use custom video to create a personal touch after you make the sale

**BONUS:** Go to [www.b2bvideotips.com](http://www.b2bvideotips.com) to download a best practices guide and see examples of actual videos that have been used to increase sales and deepen client relationships



# Agenda

Basics of Instagram

3 Cs of a Successful Social Media Strategy

- Content
- Community
- Conversion

**Q & A**



# Questions?



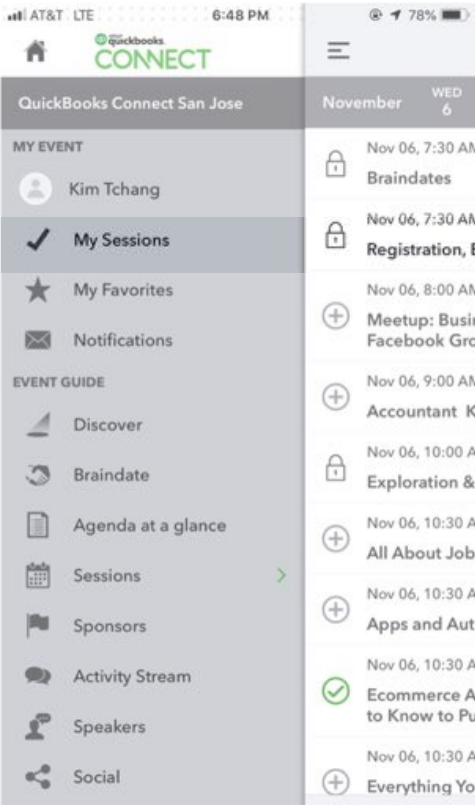




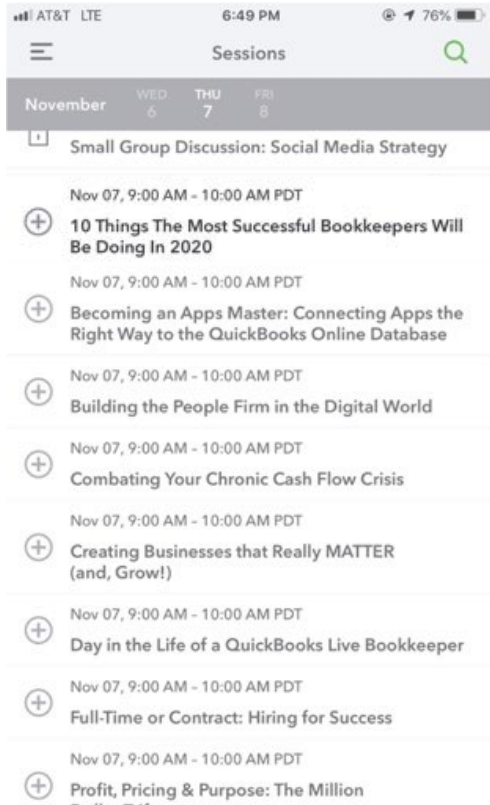
# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

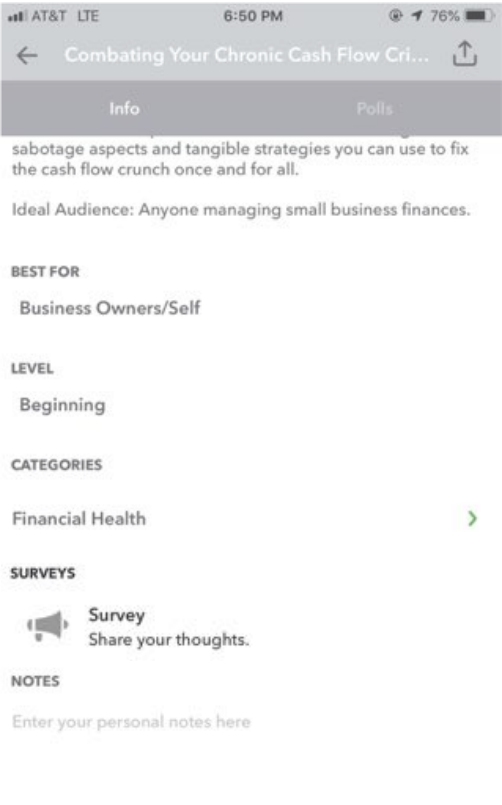
## 1. Select Sessions



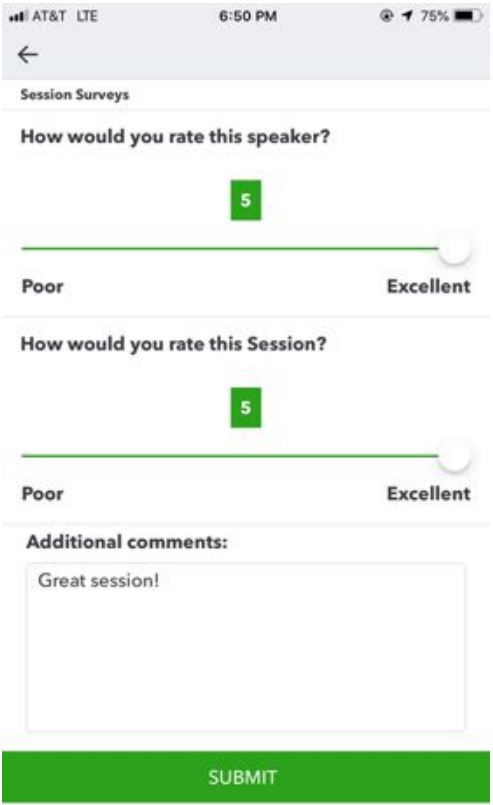
## 2. Select Session Title



## 3. Select Survey



## 4. Add Ratings



# Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. Below the header, there are tabs for November 6 (Accountant Day), November 7 (selected), and November 8. A 'Print Agenda' link is also present. The main content area features a search bar labeled 'Search for sessions' and a row of filters: Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health, with an 'Expand all +' link. The agenda list for November 7 includes: 7:30-7:00 am (empty), 7:30-10:30 am (Registration, Breakfast & Exploration), 8:00-8:30 am (Yoga), and 8:00-8:45 am (Breakout Sessions). The Breakout Sessions section lists five items, each with a '+' icon for more information: Small Business Meetup: Relationship Marketing and the Power of Human Connection, Small Group Discussion: Social Media Strategy, Small Group Discussion: Showing up - Why What You Wear Matters, and Small Group Discussion: Build Your Dream Bookkeeping firm.

QuickBooks  
**CONNECT**

Why Attend Agenda Speakers Pricing Sponsors Travel FAQ

Register now

November 6: Accountant Day November 7 November 8

Print Agenda

Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.

Search for sessions

Filters: Business Growth Life & Business Skills Organizational Culture Technology Training Advisory Financial Health Expand all +

7:30-7:00 am

7:30-10:30 am

8:00-8:30 am

8:00-8:45 am

Registration, Breakfast & Exploration

Braindates

New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more](#)

Best for: All Audiences  
CPE Hours: not eligible

Yoga

Breakout Sessions

Small Business Meetup: Relationship Marketing and the Power of Human Connection

Small Group Discussion: Social Media Strategy

Small Group Discussion: Showing up - Why What You Wear Matters

Small Group Discussion: Build Your Dream Bookkeeping firm



OWN  
THE  
FUTURE