

CPA Firm Expands Nationwide Using Social Media and Bill.com



Three years ago, Blumer CPAs transitioned from a traditional South Carolina CPA firm serving local businesses into a nationwide virtual accounting firm with major revenue streams from clients in California, New York, Austin, Denver, and Omaha. Online accounting and Bill.com enabled Blumer CPAs to provide accounting services to any firm in the US. Social media helped them to reach new clients across the nation.

Jennifer Blumer, head of marketing for Blumer CPAs, states that "all of our clients found us online."



Jason Blumer, the firm's CEO, describes the steps a potential client takes before hiring Blumer CPAs on an accounting retainer. "First, they listen to my *Businessology Show* podcast, then they'll typically read the Blumer CPAs blog and then follow us on social media."

Jennifer uses social media every day to promote Blumer CPAs, focusing on both engagement and content publishing. Twitter delivers the best engagement for her firm. The CEO's Twitter feed is followed by 5,645 people and the firm's Twitter feed is followed by more than 1,000 people. All followers were acquired organically with no advertising.



The key to their success with social media is a strong focus on content for design firms and marketing firms. Jennifer publishes content to help design firms run their business better. "Success in social media for accounting firms comes from a focus on a specific industry. Too many CPA firms will put out generic information on taxes that can be produced by other CPA firms. If you know what you sell and who your clients are, you can create unique content for a specific industry. We focus on design and marketing firms. That's the only business we take and we only provide accounting services online."

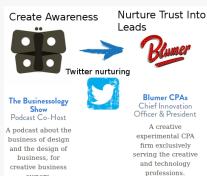


Blumer CPAs also charges more money than other CPA firms. According to Jason Blumer, "We charge more because we deliver more value. Clients understand this and frankly, that's the only type of client we're willing to work with. Our business model is based on building up the business of our clients, helping them with positioning, pricing, and business strategy."

Because Blumer CPAs is more expensive, they find that need to build more trust with potential clients before they sign on with a retainer for accounting services. Social media plays a critical role building this trust across the nation. Jason recently told a potential client that they needed to establish trust before they could do business together. The person responded, "I already trust you because I know you from your podcast." The firm soon signed up with Blumer CPAs on retainer.

This graphic below shows one of many paths that a new retained client might take before signing up for a retainer with Blumer CPAs. The example shows:

1. Design firm first hears about a free podcast that is targeted specifically at owners of design firms. Potential client listens to the podcast and likes it.
2. Potential client sits on the information. It's interesting, but since the fees are higher, they don't sign up immediately. Instead, they hang out and collect information on Twitter.
3. After the potential client develops more trust, they contact Blumer CPAs about moving their accounting business to them.



The firm's strategy to get new clients from across the United States can be summarized in these 3 steps:


1. Generate awareness
2. Nurture trust
3. sign up a new client

The CEO of Blumer CPAs runs the podcast and produces information that is specific to design businesses. He uses a combination of his personal and corporate accounts on Twitter to nurture trust until the client is comfortable signing up for retainer.

Although Jennifer uses social media to build trust with potential clients, it's not easy to measure and it may take time to develop. According to Jennifer, "It's like planting a seed that may take a year to develop and harvest. Our social media strategy is to add value to firms by providing useful information online without charging them. They can improve their business without paying us a dime. When they're ready, when the trust is built up through social media, they'll sign up as clients."

In the screen shot below, a free video on value pricing leads a potential client to an engage in an ongoing relationship with Blumer CPAs by asking for their contact information. For many CPA firms this is a radical departure from building trust with potential clients by going to the local chamber of commerce meeting. The information on value pricing is of interest to the design firms that Jason works with. Like CPA firms, design firms charge per hour, by project, or by value. Blumer CPAs publishes information online that is of interest to a specific type of company and then nurtures the relationship online with social media and online engagement.

Course registration for Blumer CPAs Strategic University



A Study in Value (Free)

This video is a reprieve to the popular video, The Value of economic basics of value, and how to apply that value to h products. Note - this course is open to anyone, so you will questions in each section. That means everyone taking the

Register for A Study in Value (Free)

This study in value is based upon Jason Blumer's popular video The Value of Puppies.

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We will never share anything without your permission

OR

Title: First Name: Last Name:

Email:

Jennifer keeps TweetDeck, a tool from Twitter for tracking and engagement, minimized on her desktop and uses it for alerts and scheduled Tweets. Both Jennifer and Jason also use Twitter app alerts on their mobile phones to stay engaged with the community when they're out of the office. For Facebook and LinkedIn, Jennifer uses Buffer to schedule content. She's evaluating expanding her use of SlideShare and Instagram. Since Blumer CPAs focuses on design firms, Instagram may appeal to designers.

In addition using podcasts and blogs to gain awareness for his CPA firm, Jason runs pricing seminars in different cities around the US to help designers improve their business. The people that attend the seminars keep in touch with Jason and Blumer CPAs using social media. They may not sign up as a client until half a year after the seminar.



Although Jennifer has years of experience with social media, she emphasizes that it is the messaging and positioning of Blumer CPAs that is the foundation of their social media success. "It would be difficult to generate sales leads for an accounting firm that is a generalist," she said. "The content would have to be bland to appeal to different audiences. Our focus on a single industry of designers is what makes our content relevant. This is why we can use social media to build trust, not just awareness. Trust is the bedrock of our growth in cities across the US."