

Branding Gets Personal

By Dawn Wagenaar
Principal

In the PCPS CPA Firm Top Issues Survey for 2009 (conducted in 2007), client retention was the number one issue for firms of any size. If this was the case in 2007 — and clients are even more price conscious today — it's no wonder that CPAs, attorneys, engineers and other professionals are ready to step up their marketing or take a dip into marketing for the first time.

Starting from zero is one challenge. But so is a brand that is muddled by years of neglect or “remodeling” by a few industrious staff. You know, the ones who create materials for their own use or edit their own bios or embrace social media independent of the firm. And who can blame them if the only available materials were created in 2003?

Branding is more than a visual image or color. A brand is the promise you make to clients and potential clients about what it will be like to work with you. Your brand promises a certain experience. The promises of your brand are based on:

- The stories you and your staff tell about the firm.
- The stories your clients tell about the firm.
- The name of the firm.
- A strong positioning statement, key messages, and tagline.
- The visual image of your packaging, including logo, type, brochures, stationery, proposals, and website.
- How you deliver the experience of working with your firm.

If everyone is saying something different about your firm, it's hard to distinguish your value from the crowd.

Why is Branding Hot?

Branding in a professional service firm involves creating and communicating stories. The secret of good branding is in integrating what staff, clients and the public thinks and expects from your firm. The best branding gains a strong and permanent place in the mind.

Think of Allstate's tagline: “Are you in good hands?” It's a tagline that encompasses a brand of keeping customers safe and secure when things go wrong...because things will go wrong at some point.

How about the Orkin® Man, a hero-like figure who protects consumers from “bad” bugs? It's a story, but also a promise.

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I N G E N U I T Y Marketing Group, LLC

is a strategic marketing, PR and training firm. Leveraging the latest tactics in websites, Internet marketing and social media with our experience in planning, branding, selling, writing and design, Ingenuity offers a highly creative (and dare we say, fun?) approach to competitive difference and business growth.



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For law firm Davenport, Evans, Hurwitz & Smith in Sioux Falls, SD, (www.dehs.com) a branding process resulted in the client promise of “The Right Lawyer, Every Time.” This firm’s business attorneys and litigators are offering a competitive difference of legal teams tailored to the clients rather than attorneys who develop business only for their own practices.

Branding in the professional services market is more difficult to chart because of long sales cycles; however, you get an immediate impression of a firm by simple things such as:

- How firm members talk about their work and their firm.
- How a business card or website feels and looks.
- Materials that are clear, concise, and speak directly to you.
- The clarity and consistency of messages.
- The ease of remembering a name and look.

A complete branding process in a professional service firm would involve:

Research

1. *Leadership Research* – Five or more leadership interviews to seek common themes.
2. *Client Research* – “A” client phone interviews.
3. *Competitive Research* – Research on three to five top competitors.
4. *Community Research* – Current marketing materials, involvement and sponsorship/philanthropy review.

Themes

1. Create a Positioning Statement – a summary that distinguishes your firm within a target market or markets.
2. Create Key Messages – essentially the experience you promise to deliver.
3. Identify competitive differences – three to five themes that set you apart from the competition.
4. Gather feedback from leadership and key employees.
5. Conduct client focus group(s) to gather feedback.

Tactics

1. Finalize competitive themes and positioning statement.
2. Train leaders and staff on use of themes.
3. Development of marketing and business development tactics surrounding themes.
4. Development or refresh of visual branding kit, including colors, logo, stationery, website, etc.

This initial branding process can be completed within one to two months, depending on the availability of clients and leaders. But its value for getting everyone to speak the same language about your firm will pay dividends in the consistency and ease of promoting your firm going forward.

Now to the stuff! Finalize your new brand program by scheduling a firm story/key message training and integration of the brand into everyday use: sales training using the brand, collateral materials (letterhead, envelopes, labels, proposal covers, thank you cards, fax sheet, and other printed materials), website and email design and social media presence, firm brochure and other collateral service brochures, firm communicator with clients such as a newsletter and other regular communication.

Remember that good branding is not gray, not safe and not always pleasant! If there is controversy about the brand promises or the images used to portray them, it probably means the work is good. It often forces a culture shift. Not everyone may like it. But avoid the urge to hold onto stocks of old stationery. Use a game, contest, client communication, public relations and mini-training discussions to help people get excited to use it.

How do you know that your new brand is working? It’s working when it allows you to talk about your firm with confidence and explain how it’s different from the competitors. It’s working when people respond with affirmative nods and additional questions. Now you have an opening to share your unique story and build stronger relationships.

Complimentary Webinars

It’s time to get your marketing groove on with InGenius ideas from Ingenuity Marketing Group! We’re giving away our marketing advice for FREE in this first-ever series of webinars on captivating copywriting, websites that sell while you sleep and marketing initiatives that actually make a difference! Who can argue with free when you get three hours of valuable marketing insight in tasty one-hour bites?

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SEO v. REO: *What's the Difference?*

*By Wendy Nemitz
Principal*

Every time I talk to a partner for the first time at a law firm or engineering firm or CPA firm or fill-in-the-blank firm, I hear the same comments: “We don’t get new clients from our website. They all come through referrals from other satisfied clients. Our business growth is mainly word-of-mouth.”

Then they tell me that websites do not really help them acquire new clients; they are just something they have to do. So why are the second most visited pages¹ on any professional website the firm leadership or bio pages? Your website has actually become a critical part of developing new clients from referrals.

How does a website support the business development process? When someone searches for your firm on Google, you need to consider not only Search Engine Optimization (SEO) to make sure that your firm appears high in search results, but also what I call REO — Referral Engine Optimization. I coined this term. Feel free to borrow it and source me on it.

There are three primary ways that prospects use search engines and firm websites in the vetting or qualifying process. This process is similar to how you qualify prospects: cold, warm and hot.

In a cold search, the prospect is using Google or another search engine to locate a product or service with no other reference. They may type in “personal injury law firm Minneapolis” or “tax planning Philadelphia.” They are looking for a certain type of knowledge, location and professional who might look like an “approachable” or “experienced” advisor.

In a cold search, SEO is important because keywords and website content and links to other sites will help your site line up with all the cold prospects searching for you. There are lots of ways to build a website with good coding, links and content to support cold search. You could spend a couple thousand dollars or ten times that.

However, as we know in business development, a warm or hot prospect is a much stronger bet for closing a sale. Warm prospects are those who have a referral to your firm. (They have probably received three to five referrals to various firms.) Before they commit to calling and taking time to meet with your firm, they are going to look up your website, bios and

other information. They will weigh its impression against the other referrals they have received. Then they decide who to call first. If your website is not REO-friendly, you lose and never know it.

Your hot prospects also use your website for decision making. They may have already met with you and there is more than one decision maker who will seal the deal. Now they’re digging deeper — comparing your team bios against the competition, checking out your connections on LinkedIn, reading your articles or press clippings. How do you stack up against another firm in your branding and messages? Do they match how you talk about your firm?

Build REO to Reach Every One

SEO by itself is important and good. But good SEO combined with great REO is what most firms we work with need. Some of the most important factors for REO include the following:

A Clean Home Page that offers messages about competitive difference and easy navigation. For a good example, visit Moquist Thorvilson Kaufmann Kennedy & Pieper LLC: www.mtkcpa.com

Sophisticated, Content-rich Bios. Check out Michele Vallaincourt’s bio at Winthrop & Weinstine: www.winthrop.com/professionals/michele_d._vaillancourt.aspx

Informative Niche Services Pages. See one at Carlson Advisors: www.carlson-advisors.com/industries-manufacturing.html

An Engaging Firm Story or History. Visit TKDA Engineering: www.tkda.com/100/index.html

Resources Created by the Firm. Visit BPK&Z’s podcast page: www.bpkz.com/resources-podcasts.php

Testimonials or Client Success Stories. See Platinum Bank: www.platinumbankmn.com/events/index.htm

A Unique and Branded Web Design. See all of the above.

REO Means Business

How do you know if some of your prospects are contacting you or calling you in for a second meeting based on some aspects of your online presence? First, you could ask them. Ask them if they visited your site, what they looked at and how long they stayed. What made them stay longer? What made them click off?

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You can also find out by tracking the number of hits to your bio pages and home page and firm page. You can survey clients regarding the parts of your website they visit most. You can ask your referral sources if they point prospects to your website. If they don't, why not?

If you're not on the first page of Google results when a visitor types in your firm name or the name of a firm leader, it's likely an SEO issue.

If you have ever had a referral source ask you if their client called — and the client didn't call — it could be a failure of REO. Are you losing potential clients you don't even know exist?

Websites are a serious investment of time and money, for sure. But once the site is up and showcasing the best aspects of your firm, it's out there 24/7 for all the world to see. Do a little research on how your current site is being used by your referral sources and prospects in the decision making process. Maybe it could use some Referral Engine Optimization.

¹The most visited web page, by the way, is the Careers page. This just proves that younger professionals naturally leverage websites for research. Just keep in mind that those "young professionals" keep getting older and they will keep using technology to make decisions.

Summer Respite

Sack races, chalk and water balloons tested the bodies, minds and team spirit at Ingenuity when we enjoyed a company social at Liz's house in August. Divided into three teams (Victorious Secret, Strip and Go Naked and Kick-Ass), we were neck and neck to the end, when Team Kick-Ass pulled off a clincher by naming the most state capitals. We were good sports and still ate dinner together afterward.



Clockwise from top: Wendy, Sara and Kristy prepping their next water balloon toss to their teammates; Christine, Kristy and Dawn as team "Victorious Secrets"; the winning sidewalk artwork; the three-legged race featuring Liz and Kara, Christine and Kristy, and Sara and Rachel (with Kristin looking on).