

Captivating Copy

Making Accounting Sound Cool



Why We're Here

- CPAs Dead or Alive?
 - create a mini saga
 - sticky ideas
 - where to stick them
- How to Captivate
 - examples of sticky ideas
- Clarity and Strategy
 - finding your voice
 - getting fresh
 - getting clear



Captivate or Kill?

“Companies of all sizes consider us their trusted advisors, relying on us to help them grow beyond their expectations. Through a full menu of professional services, and our 70 plus years of experience and knowledge, we can do the same for you! Our services include corporate tax consulting and more...”

—*from an actual accounting site*



What's Your Story?

Create a Mini Saga

“When we were kids, we stood back and analyzed the crowd at the playground, figuring our chances for making friends and how to avoid getting sand in our shorts. Today, we assess the possibilities for tax savings and avoiding business discomfort.

Risk awareness is our life. Accounting is our business.”



Captivating Copy

- Simple
- Unexpected
- Concrete detail
- Credibility
- Emotion
- Stories

—from “Made to Stick” by Chip and Dan Heath



Where's Your Story?

Newspaper “society” columns have become:

- Facebook and MySpace
- Reality TV
- Bios
- Firm Story
- Client Stories
- Tweets





SIMPLE

Website Navigation and Narration
“Enlightened Financial Planning”



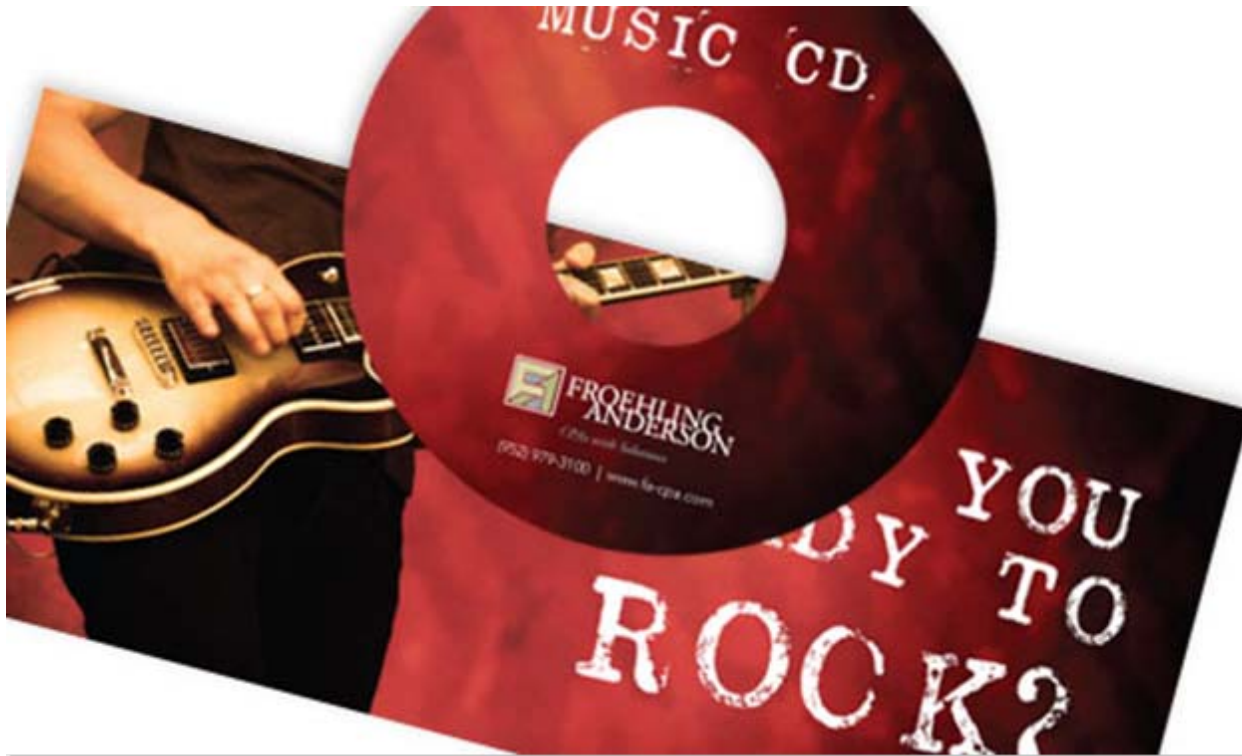
MARKETING
PALOOZA
AAM SUMMIT 2009

UNEXPECTED

Recruitment Magazine



MARKETING
PALOOZA
AAM SUMMIT 2009



UNEXPECTED

Direct Mail/Manufacturing
Rock CD



CONCRETE

Web Bios

"We want to be the people to call about business or life decisions beyond the tax return or financial statements. We structure each relationship so they can call us anytime. If they call us often, then we can be involved in their decision making process and help them to head off problems and provide solutions."



CREDIBLE Blogs



CRM Unites
Leadership, strategy, processes and technology for users of Microsoft Dynamics CRM

MONDAY, MAY 4, 2009

Competitor Tracking with Microsoft Dynamics CRM

Often companies will keep competitive information in a separate database or paper file, and throwing information into that file is like throwing it into an abyss! It is never to be seen again! The data is not accessible by others in the company, and it is not available for analysis of any kind. This scenario presents another case for why marketing should be included in the implementation of Microsoft Dynamics CRM in your organization.

Microsoft Dynamics CRM has an area for tracking competing companies and/or products called Competitors. It is displayed in the Sales area, so it is often overlooked by marketing. Out of the box, Competitors are related to the Opportunity. You can track multiple competitors per Opportunity, and when an Opportunity is lost, you can specify a Competitor associated with the loss. Competitive win/loss reports help your sales and marketing teams analyze the competition over time.

For marketers, the Competitor area in Microsoft Dynamics CRM comes with some basic fields and the ability to create a SWOT analysis for each company. In addition, Email can be tracked against a competitor, and files can be uploaded and linked to the competitor record to keep your market research digital.

With a little configuration, the Competitors area can be adapted further to support your sales and marketing strategy. Here are some ideas that other companies have adopted.

Nurture your Competitor's Customers

Through the Configuration area of CRM, a relationship can be established between Competitors and Leads and/or Competitors and Accounts. This allows you to select a competing product or company that is already working with your lead or prospect. This is helpful in the sales process, but it's also strategic to collect this information even when the lead is not ready to look at your services (i.e. there is no

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Twitter Updates

- Just joined a twibe. Visit <http://twibes.com/customer-experience-to-join-about-an-hour-880>
- Just joined a twibe. Visit <http://twibes.com/DynamicsCRM-to-join-about-2-hours-880>
- RT @HubSpot: What Are Your Road Blocks to Inbound Marketing Success? <http://tinyurl.com/dob4w4w> - definitely fear! about 6 hours ago
- @stephens great presentation @specc #TDAY - agree people



EMOTION

Thanksgiving Day Card



STORY

Direct Mail

“Our accountants originally provided tax services but then we acquired a new company that had never had an audit. For SEC purposes we needed this firm to do three years of audits on that company in under 75 days.

They delivered.”



From Strategy to Tactics

- Understand what sticks
- Know your voice
- Avoid overused words and phrases
- Find fresh messages



Citizen Authors: What's your Voice?

I suspect that were the Ten Commandments written by a modern corporation, the first would read: “Do not kill, murder, or deprive of life, except on conditions wherein it is a requirement of self-defense, appropriate to the service of a military (army, navy, air force, but not paramilitary) organization; see Appendix L for a full listing...”

—David Silverman



CPAs Dead or Alive

Top 10 Overused Words

- Optimize
- Paradigm
- Synergy
- Value add
- Take away
- Thinking out of the box
- Going forward
- At the end of the day
- Ideation



Creating Fresh Phrases

- Listen
- Combine disciplines
- Steal
- Brainstorm/free-write
- Simplify
- Use a thesaurus and wikipedia



Getting Clear: Key Messages

“We’re tons of fun and we get things done.”



Other Thoughts

- Avoid passive construction
- Be audience-appropriate
- Avoid under and over-editing
- Don't sound academic



What We've Told You

- Story - emotion, detail, simplicity
- Avoid overused and cliché phrasing.
- Get clear on key messages - repeat them.
- Target two areas of communication; build on it.
- Don't take words for granted.
- When in doubt, ask a professional.



Who is Ingenuity?



We focus on:

**The People of Professional Services
including:**

- **Growth Strategy**
- **Training & Coaching**
- **Branding**
- **Public Relations, Websites, Collateral,
Marketing Campaigns**



Thank You!

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