



Digital branding for CA firms within the ambit of ICAI regulations






“Lets do a quick show of hands to understand demographics”


Practicing Chartered Accountants

Chartered Accountants in Service

Aspiring Chartered Accountants



How many of us here would rate yourself 8 or above on scale of 10 on your digital presence ?



***Digital Marketing is BAD! Its not for me!
Not my cup of tea (or coffee!)
And its against ICAI regulations...***

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| Summing Up |

Regulations - ICAI

THE FIRST SCHEDULE : PART I of CA Act, 1949

Professional misconduct in relation to CAs in practice

A chartered accountant in practice shall be deemed to be guilty of **professional misconduct**, if he

- **solicits** clients or professional work either directly or indirectly by circular, advertisement, personal communication or interview or by any other means:



The Institute of Chartered Accountants of India

(Setup by an Act of Parliament)

Regulations - ICAEW

Code of Ethics B section : Committee of Advertising Practice (CAP)

250.2 : A professional accountant in public practice shall not bring the profession into disrepute when marketing professional services. The professional accountant in public practice shall be honest and truthful and not:

- Make **exaggerated claims** for services offered, qualifications possessed, or experience gained; or
- Make **disparaging references or unsubstantiated comparisons to the work of another.**



Regulations - CPA

- Prior to 1978, CPAs prohibited from using any form of advertising.
- Landmark Supreme Court Case,
Bates v. State Bar of Arizona, (1977) :
Attorneys have the constitutional right to advertise under the First Amendment.
- AICPA lifted its ban on advertising. However, continued to restrict certain forms of advertising such as self- laudatory or comparative claims, testimonials or endorsements, and advertising not considered by the AICPA to be professionally dignified or in good taste. These restraints probably served to discourage many CPAs who might have considered advertising from doing so
- Commencing 3rd Aug 1990, CPAs were allowed broader rights to advertise under an agreement signed by the Federal Trade Commission (FTC) and the American Institute of CPAs (AICPA)
- CPAs are now allowed to engage in any type of advertising, as long as it does not violate the FTC Act's Section 5, which disallows false or deceptive advertising.



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Competitive Landscape for Practising CAs

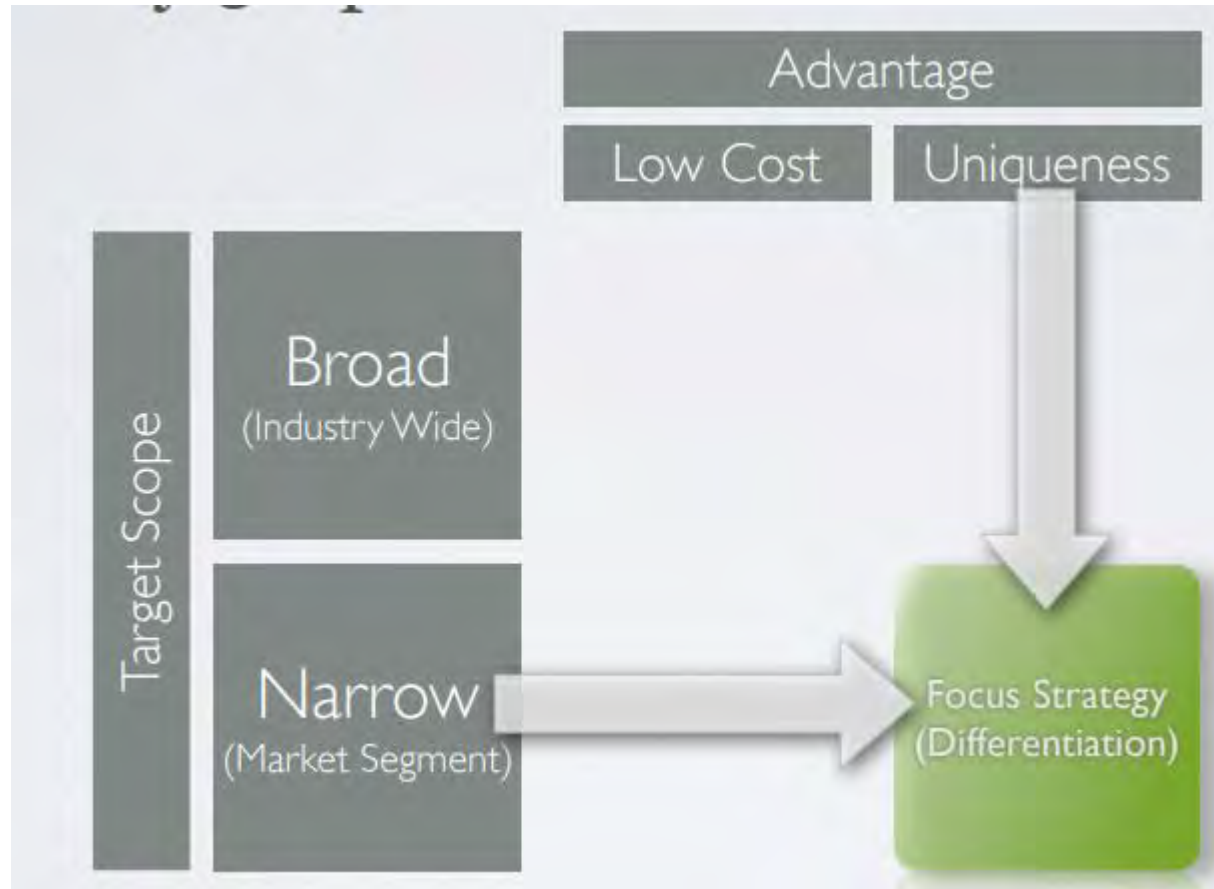
| Region | FELLOWS | | | | ASSOCIATES | | | | Grand Total |
|-----------------|--------------|-------------|-----------------|--------------|--------------|-------------|-----------------|---------------|---------------|
| | In Practice | | Not In Practice | Total | In Practice | | Not In Practice | Total | |
| | Full Time | Part Time | | | | | | | Full Time |
| Western | 21824 | 779 | 4133 | 26736 | 17388 | 1859 | 51436 | 70683 | 97419 |
| Southern | 16124 | 740 | 3416 | 20280 | 7357 | 1059 | 26317 | 34733 | 55013 |
| Eastern | 7400 | 204 | 1308 | 8912 | 3846 | 323 | 11437 | 15606 | 24518 |
| Central | 14266 | 365 | 1863 | 16494 | 10806 | 778 | 20510 | 32094 | 48588 |
| Northern | 15479 | 653 | 3535 | 19667 | 10183 | 1047 | 25758 | 36988 | 56655 |
| TOTAL | 75093 | 2741 | 14255 | 92089 | 49580 | 5066 | 135458 | 190104 | 282193 |

Today there are over manifold full service accounting firms. This means there is absolutely **NO** competitive advantage in calling yourself a full service firm.

Porter's Generic Strategies



Best option for accounting firms



Why focus 'an inch wide, mile deep'?

- You get really really good at serving their needs
- The power of specialisation
- You get to intimately understand their situation and needs
- You can go a 'mile deep' in the services you provide
 - Wide range, and extensive depth to the services
- Become a Thought Leader and Authority in this market
 - Comes full circle, reinforcing your marketing

Branding is the Need of the Hour

And So Did The Leaders of Modern Industry

*"If this business were split up, I would give you the land and bricks and mortar, **and I would take the brands and trade marks, and I would fare better than you.**"*



- Quaker Chairman John Stuart, ca. 1900, quoted in [Brand Valuation](#)

Digital Branding

The process of creating and promoting the online identity and brand story of a firm or individual.

Typically involves using online channels such as websites, social media, webinars, search engine optimization, online reviews, guest blogging, earned media and digital advertising to build engagement and drive greater exposure.

In the context of professional services, you can think of your brand as the visibility of your reputation.



According to McKinsey, “professional services firms, more so than other businesses, are innately social organizations.” Yet for the most part they have been relatively slow to embrace social media.

Social Media is an amazing fit for professional services firms because their unique structure allows them to sharing multifaceted content with others.

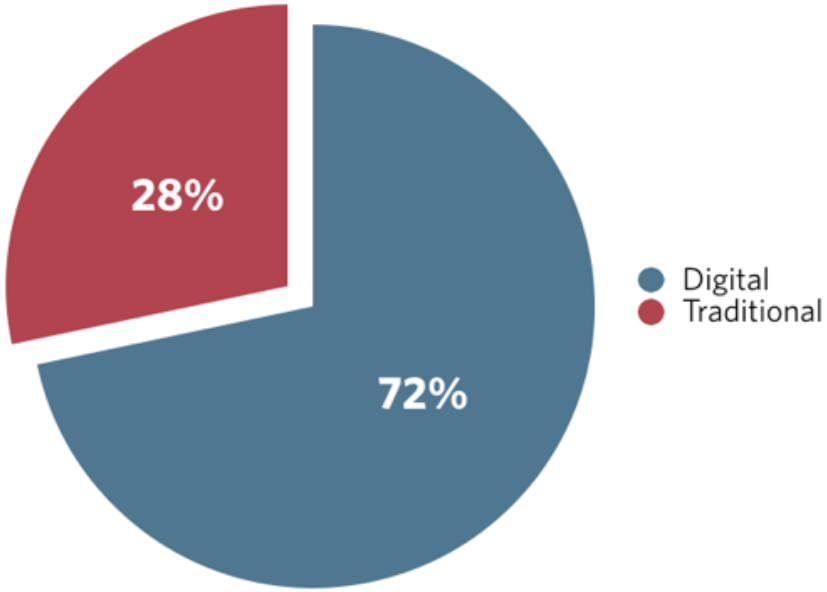
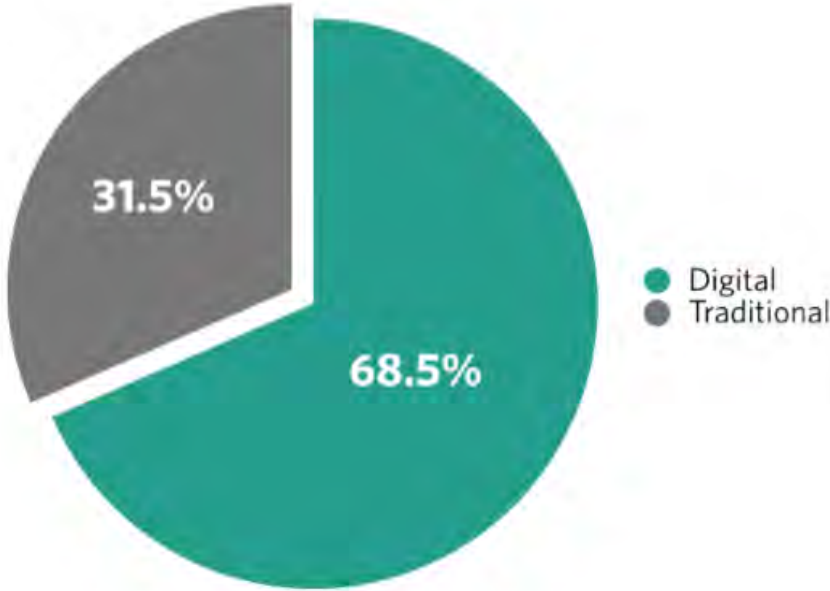
The Content Pyramid

- a) At the top is the firm, positioned to create and deliver business-wide messages.
- b) The next layer is sectors and practices, where relevant issues, topics and insights can be shared and digital reputations embedded within specific communities.
- c) The base layer is the individual, the firms' most powerful social media ally. Individuals provide firms with a powerful dimension to strengthen their reputation and open up further networks.

Decision makers and influencers are more likely to connect with individuals than brands which leads to networking opportunities, personalized conversations, and new business opportunities for the individual and the wider firm.

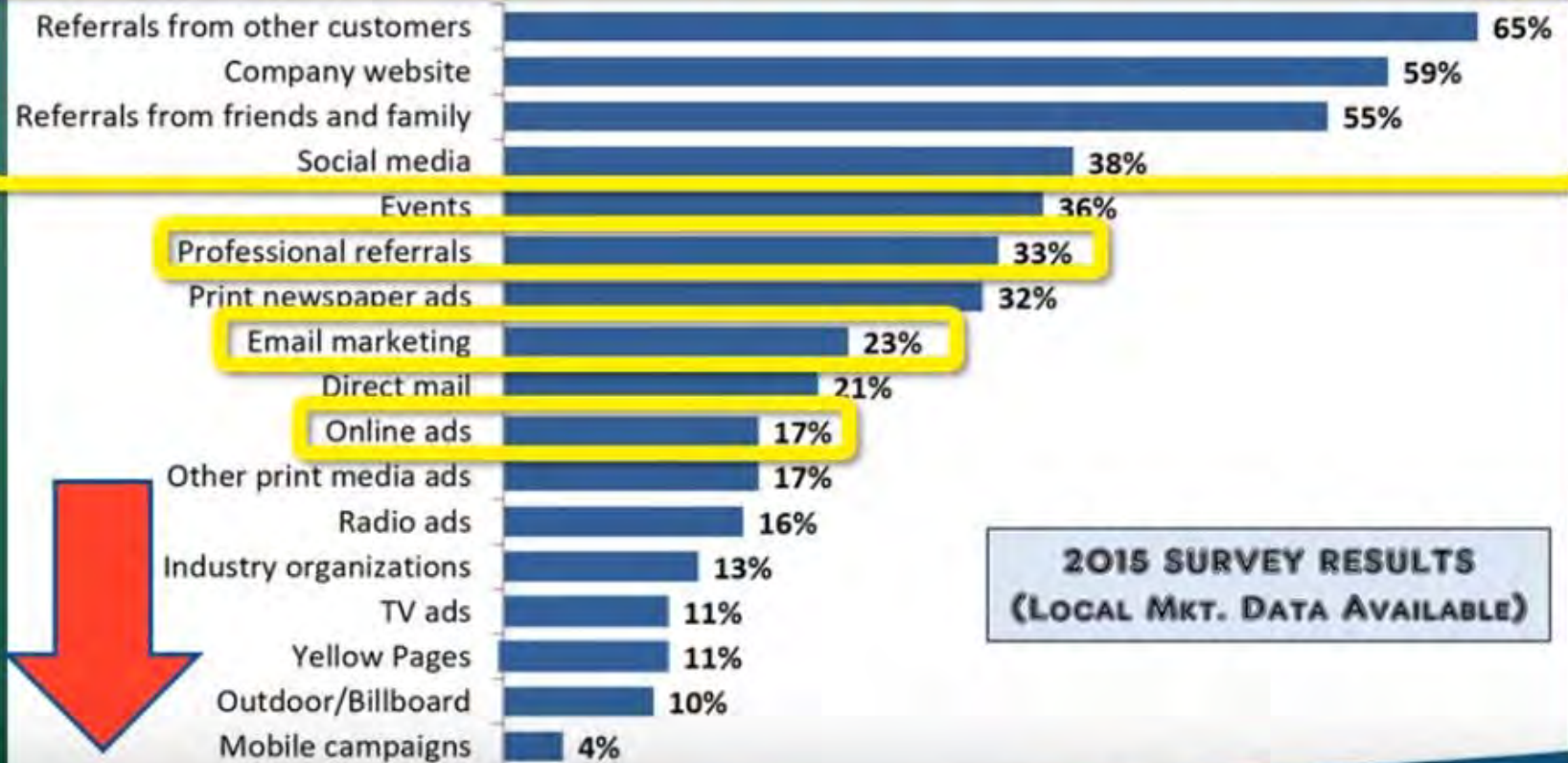
Each layer provides the firm with a different/new opportunity to create and relay content

Probability % - Channel Type used by Buyers to research a business challenge/evaluate service providers



Source: HingeMarketing

What Drives New Business



2015 SURVEY RESULTS
(LOCAL MKT. DATA AVAILABLE)

WHY DO ACCOUNTING FIRMS USE SOCIAL MEDIA?



Brand awareness

69%



Share info with clients

49%



Enhance discussions

35%



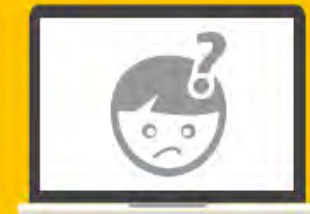
Target new clients

35%



Everyone says you should do it,
not a huge focus

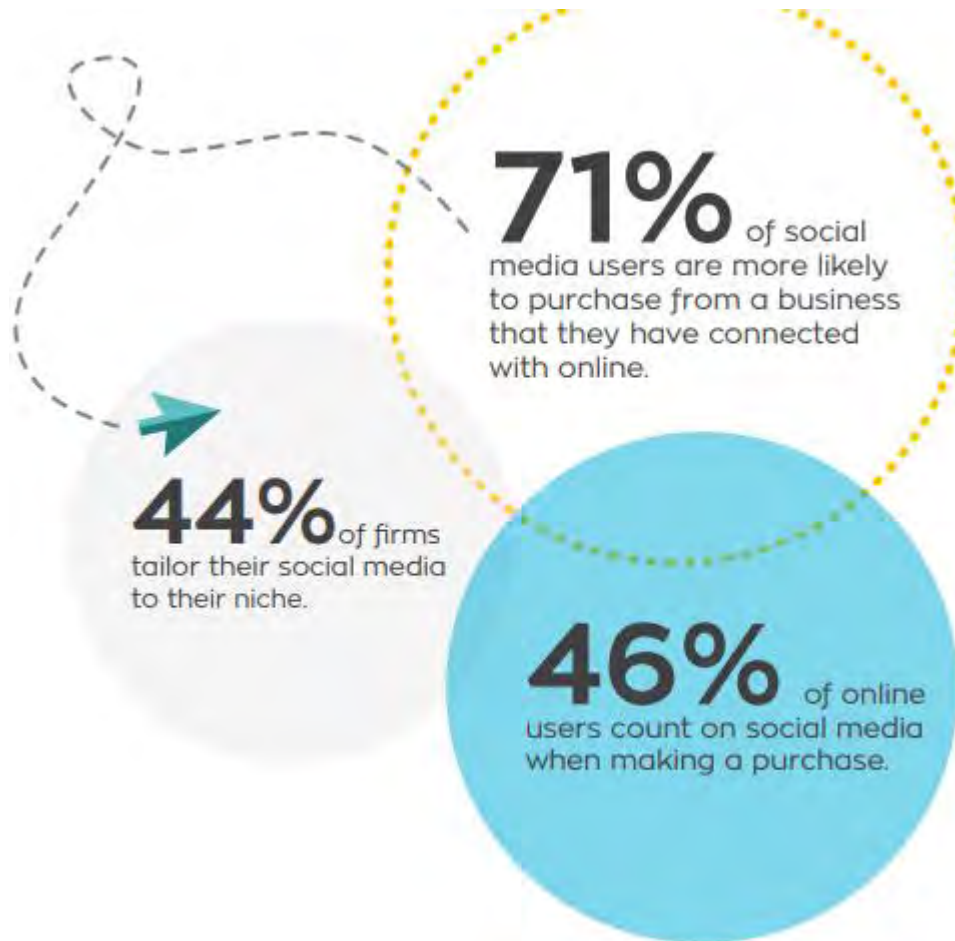
15%



Don't use it

11%

Targeting prospective clients using social media?



● ● ● Social channels firms are using

twitter 78%

facebook. 73%

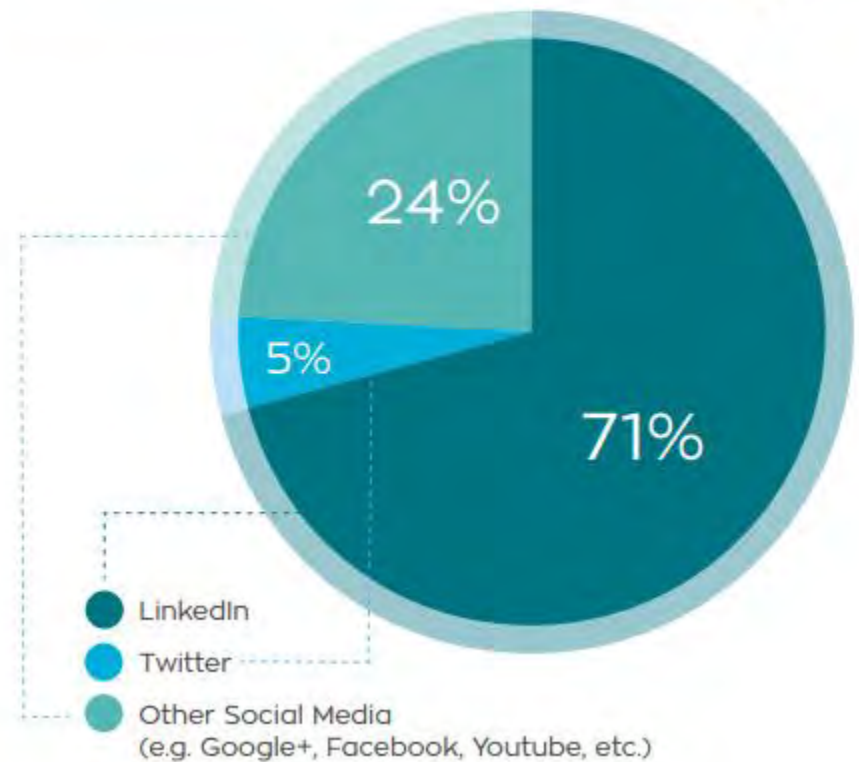
LinkedIn 76%

Google+ 27%

YouTube 27%

Don't use social 9%

Social channels used by accounting and financial services buyers



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- Content is king on the internet, and key to the online marketing efforts of any CA firm.
- Content marketing is a buzzword that most firms are aware of, but aren't great at implementing.

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Guidelines for Website-ICAI

- The Chartered Accountants and/or Chartered Accountants' Firms would ensure that their Websites are run on a **“pull”** model and not a **“push”** model of the technology to ensure that any person who wishes to locate the Chartered Accountants or Chartered Accountants' firms would only have access to the information and the information should be provided only on the basis of specific **“pull”** request.

What makes a good website ?

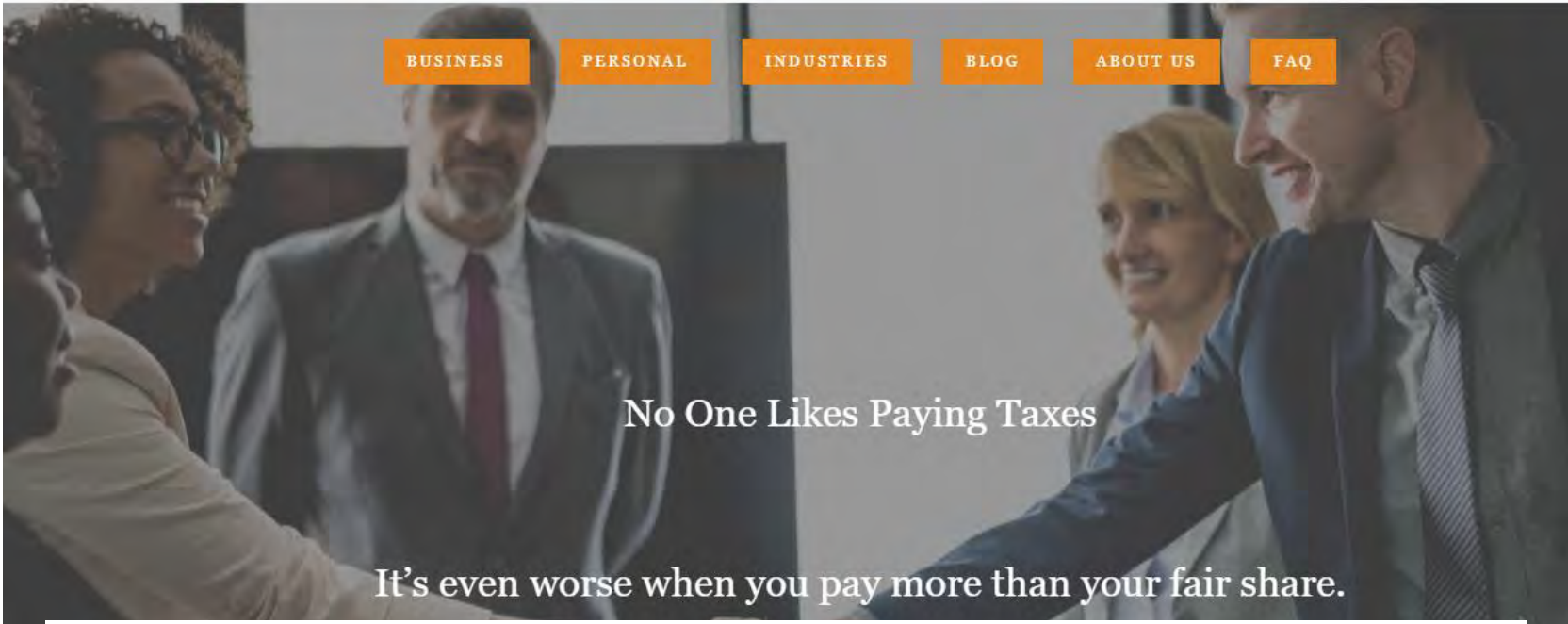
- Professional Looks
- Is it easy to navigate the site?
- Answers questions:
 - a) What's your niche?
 - b) What information & tools you provide?
 - c) Client Testimonials
- Optimised for Search Engines /SEO
- Mobile Friendly



CLIENT ACCESS

LOCATIONS

INQUIRY



BUSINESS

PERSONAL

INDUSTRIES

BLOG

ABOUT US

FAQ

No One Likes Paying Taxes

It's even worse when you pay more than your fair share.

Are you feeling the pain of taxes?

Are you suffering from annual tax surprises?

Do you find out what you need to know at a time when it's too late to do anything about it?

Conversational design is all about creating websites that are tailored for each user and that anticipate their needs.



People want sites that are tailored to their specific needs and make them feel like they're important (which they are!)

If you can't provide that experience, you can't win them over 😊

- DENTAL
- MEDICAL
- OPTOMETRY
- PHARMACY
- VETERINARY
- REAL ESTATE
- CONTRACTORS

MEDICAL PRACTICES

If you're a Medical Practitioner, you'll know how complex and demanding this industry is. Just as you wouldn't expect your clients to simply pick a medical practitioner out of the phone book without doing some research first, we wouldn't expect you to choose an accountant simply because they're next door. You want a professional like yourself who understands your unique pressures and requirements. Holden Moss, North Carolina Certified Public Accountants, have a wide range of experience working with medical practitioners, and it's our privilege to help this community thrive.

We are committed to staying up to date with the specific business-related issues relevant to the medical industry, and our accounting work with general practitioners, specialized medical practitioners, and sole practitioners in the medical industry has well prepared us to help you in your practice.

Specific Challenges in the Medical Industry

Need for Segmentation

Are you like many Doctors?

- You struggle with understanding what the numbers mean, and how you should respond.
- You want to provide the best care in a fee competitive environment - but how?
- Is your new practice debt overwhelming? Struggling with how to pay it off quickly?
- You care deeply for your patients, seeking the best for them.
- You want someone who will speak with you often, and on your level, not technical jargon.
- Does it sometimes feel like the team is tearing apart?
- If you have a profit, you worry that taxes will eat it all up.
- Often, profits are minimal. Are you able to draw market-rate compensation for yourself.
- You hate surprises, particularly cash flow surprises.
- We commonly hear you feel disconnected from you business, like you are losing touch. You feel alone and maybe a bit helpless.
- And all this may be affecting the most important relationships in your life.





OPTOMETRY PRACTICES

We often use the word 'vision' when we're talking to business owners. As opticians, you'll realize more than anyone how critical vision is to life – and how important your business vision is to your business life. We've worked with optometrists to ophthalmologists, a variety of opticians and those in the optometry industry, through all the stages from startup through to business sale.

Helping you have clarity in your optometry business is important to us, too. We can help you with basic accounting, tax and business coaching services – and we can go beyond, helping you identify key profit improvement strategies, and addressing your personal wealth, and identifying tax minimization strategies.

Specific Challenges in the Optometry Industry

If you own an optometry practice, you'll be facing a variety of issues related to operations and finances. With looming changes in the healthcare environment, optometrists in private practice must stay aware of the current trends and their effect.



Psst. Don't get caught out this tax season!

Get our **FREE Sales Tax Crash Course** for **Amazon Sellers** delivered straight to your inbox.

EMAIL ME THE FREE COURSE





The Institute of Chartered Accountants of India

(Setup by an Act of Parliament)

Guidelines for SEO -ICAI

ICAI Regulations allow listing on suitable search engine

However, the field of search should be restricted only to the field of “Chartered Accountants” or “CA” or “Indian CA”, “Indian CPA”, “Indian Chartered Accountant” or any permutation or combination related thereto.

SEO is the practice of utilizing specific goal-oriented strategies to get your site ranking higher in search engine results pages, or SERPs

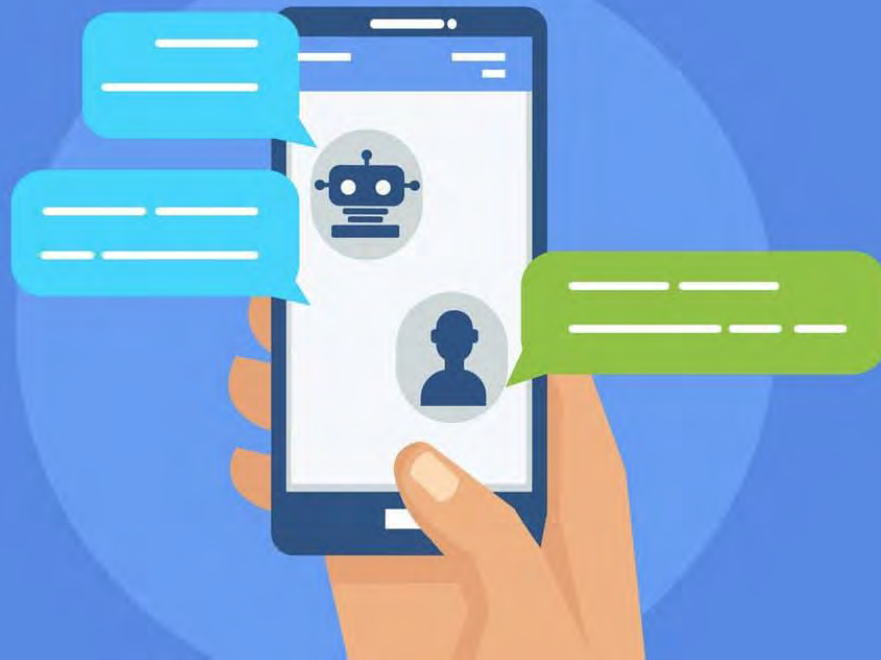
It's important to note that accounting clients also search for specific topics online: accounting issues they're dealing with, help with interpreting new regulations or trying to solve business problems.

Firms that are using SEO to optimize their content whether it be whitepapers or blog posts will be the ones clients get their answers from.

Duplicate Content is a No No

- Google, like real people, likes original content.

CHATBOT



What difference can Chatbots make?

Chatbots -> Extension of a firm's customer service offering

- a) Instill the brand's personality
- b) Provide helpful information.

Consider this , when used on a firm's home page, chatbots can converse with a first-time visitor and answer questions or point them in the direction of the information they need.

- This 'conversation' is much more engaging and memorable for a potential client rather than just trawling through a website—
- Signposting information in this way results in a better-quality user experience



Chat With Us

Accounting Firm

Welcome 🙌 to our Accounting Firm website. How may I help you?



Dana:

Please write your question or choose one of the options below to get help with:

Bookkeeping

Payroll

Business Accounting

Financial Reporting

Prices

Location

Contact Us

| Type Here ...





Chat With Us

Accounting Firm

Please type in your phone number. This way I can get the right person to get in touch with you.

visitor:

I need advice



Dana:

One of our representatives will get back to you with recommendations about our services and offerings. Please write your phone number and we will get back to you soon.

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On-site Content Creation Process For The In-houseBlog



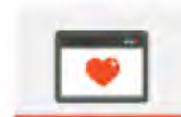
Attracts new visitors through search



Provides fresh content to search engines



Builds trust by providing useful, authoritative information



Gives people a reason to keep coming back to your site



Warms prospects by educating them about your industry/company

BOTTOM-LINE BENEFITS



Improved search rankings



Traffic growth



Increased conversions



Revenue growth



Brand lift

Why Is Blogging for CA Firms Worthwhile?

Often I get told that CA Firms “get all their clients from referrals” and therefore digital strategies are a colossal waste of time and effort.

Let's ask a simple question: what's the first thing someone's going to do if they are referred to you or become interested in engaging you?

Answer: Google!

And when they find your site (which they will) are they going to find:

- a) Vibrant active series of blog posts on topics that interest them; or
- b) “latest updates” section with a 24 word #humblebrag article about something that happened 19 months ago?

Please don't say (b)

Why Is Blogging for CA Firms Worthwhile?

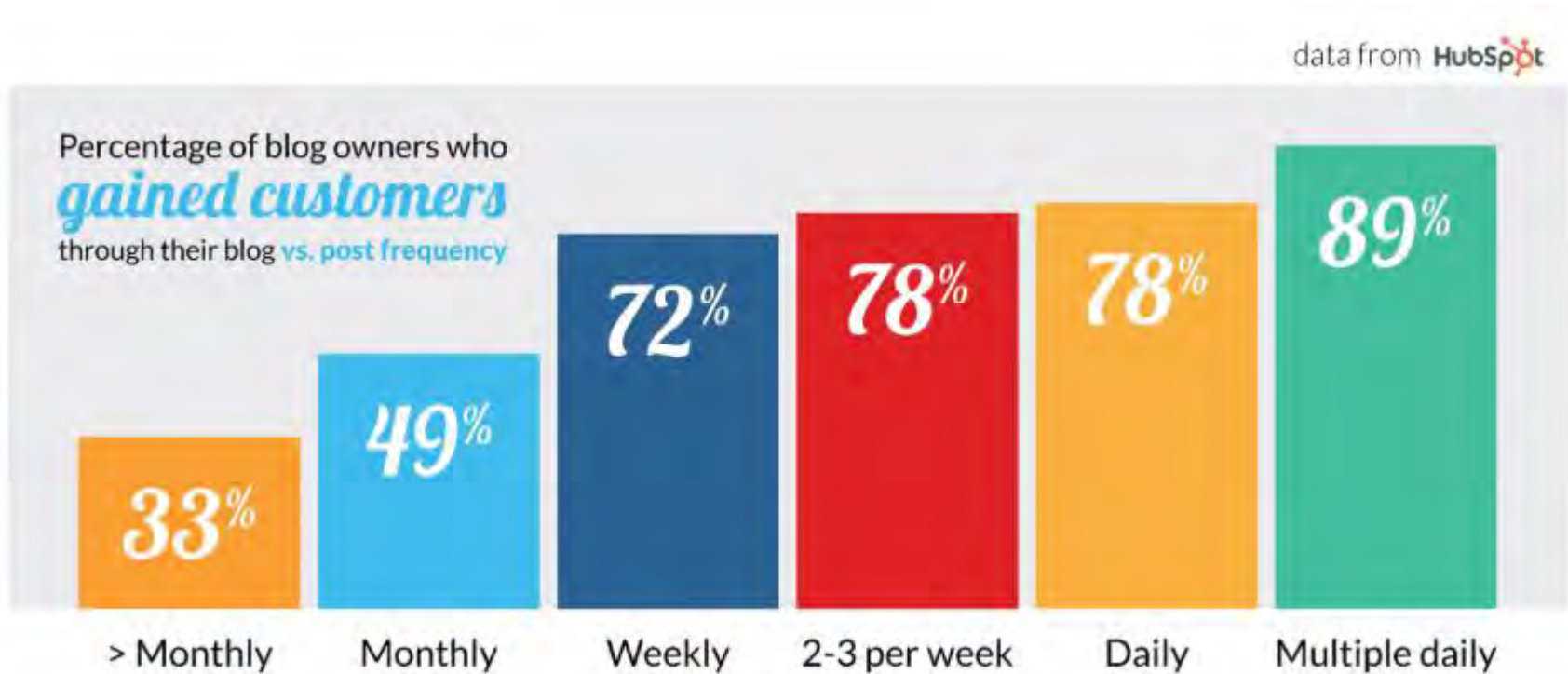
Remember that “traffic to your site” is pointless if you don't have a functional website strategy.

But with that in mind, blogging consistently will form a foundation of useful information that people can find.

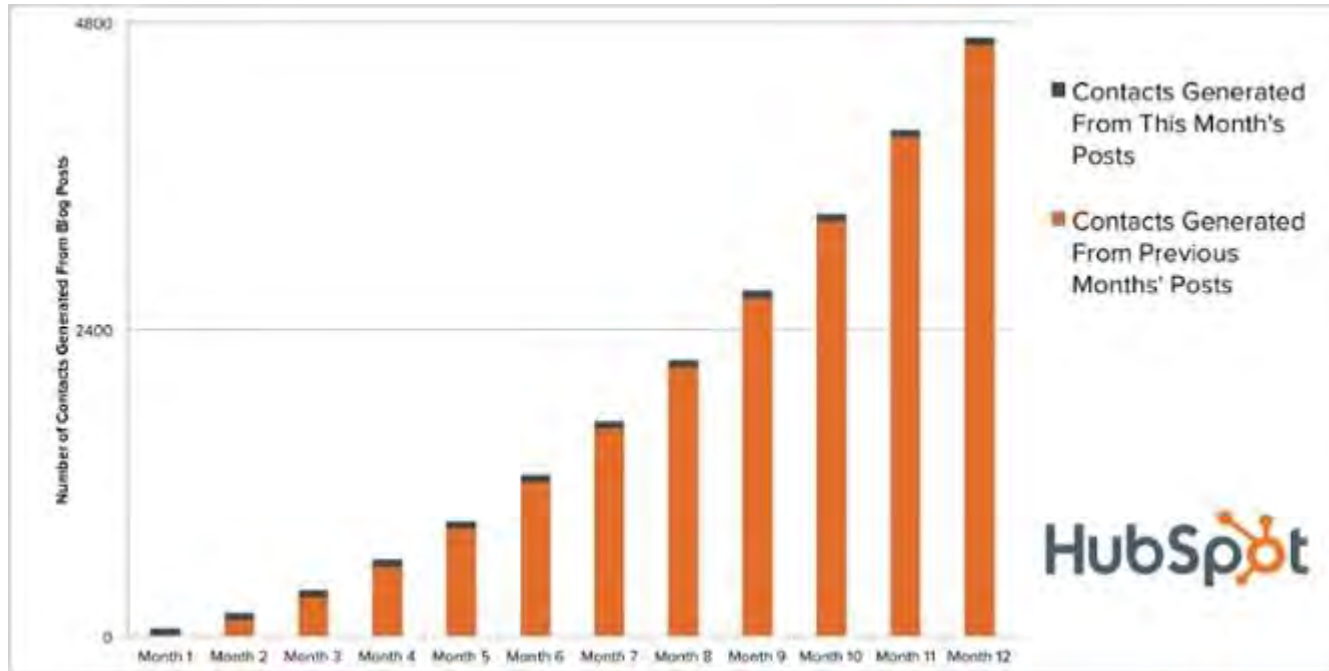
Done right, blogging does your lead generation for you and helps bring qualified visitors to your site, some of whom may become clients.

As you build up a body of fantastic blogs, you're going to generate more and more traffic, which means more and more leads, which means more and more business.

Bloggng Is Certainly Worth It



A blog is a long term investment



Your blog is an asset. Over time it does more and more work for you.

You must have an effective method of email communication to ensure repeat visitors.

The Current Reality

Tons of firms are cranking out blog content and not seeing results.

Why? Most firms aren't creating the right kind of content with the right mix. **They're stuck creating boring monthly tax updates that don't provide any value.**

Your prospects are looking for thoughtful, meaningful, and extremely insightful content that answers their questions and solves their problems.

Your content needs to go beyond blog posts to include email campaigns, videos, calculators, tax guides — even FAQs!

Create a cornerstone asset. A BIG piece of content that serves as your main lead driver - purchase price allocation, maybe good will impairment which are all part of business evaluations, or ways to determine my business value

a) 2,000+ words

b) Showcase the firm's deep expertise within a topic.

Once you have published it on your website

1. Send an email to your email newsletter list with the article or a link to it (only the people who care about this topic please)
2. Publish the blog again on LinkedIn Pulse
3. Made a video of the blog
4. Recorded the audio of the blog as a podcast
5. Published the blog on Medium
6. Post the blog on your social media handles
7. Have all of your relevant staff share the post on social media

Firms get most engagement from:



The average person has 5 social media accounts and spends 1 hour and 40 minutes each day browsing these networks.

Infographics





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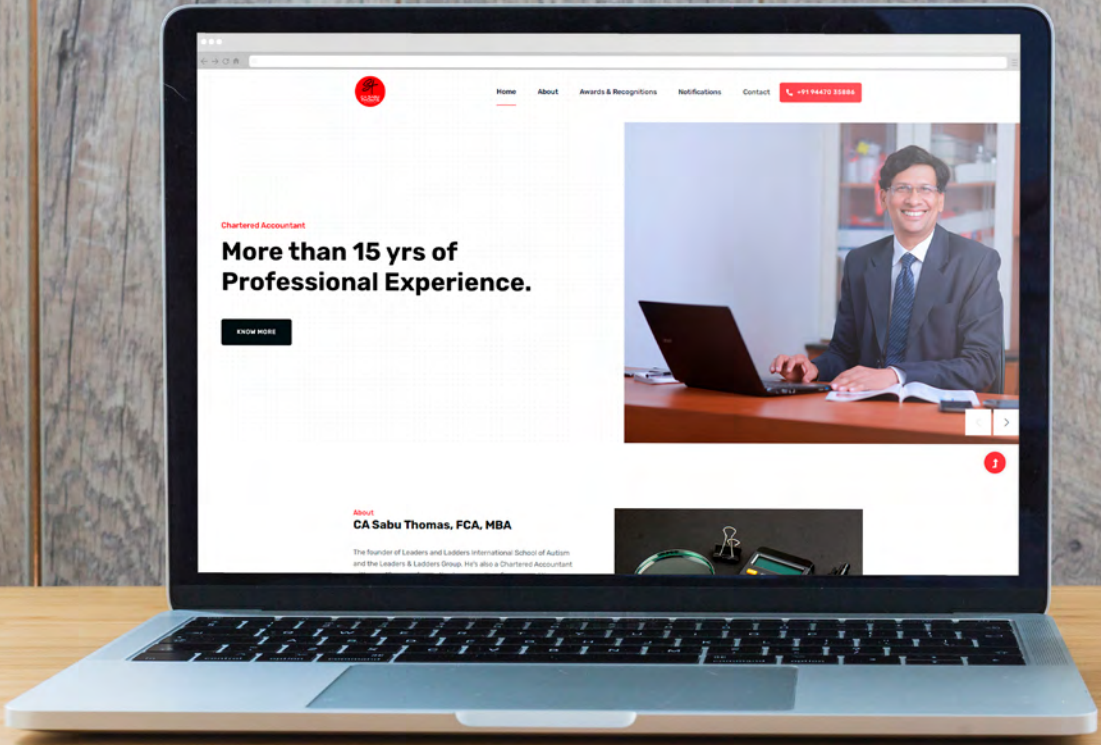
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MANAGING PARTNER, LEADERS & LEADERS
GROUP OF SOCIAL ENTERPRISES

REGIONAL COUNCIL CANDIDATE,
ICAI SIRC ELECTION 2021



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More than 15 yrs of Professional Experience.

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About
CA Sabu Thomas, FCA, MBA
The founder of Leaders and Ladders International School of Autism and the Leaders & Ladders Group. He's also a Chartered Accountant





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സാബു തോമസിന് സിഎഫ്ഐ അവാർഡ്

മിസ്സിയുടെ സിഎഫ്ഐ അവാർഡിന് കേരള ഫിനാൻഷ്യൽ കോർപ്പറേഷൻ ഫിനാൻഷ്യൽ കൺട്രോളർ സാബു തോമസിനെ തിരഞ്ഞെടുത്തു. ഇന്ത്യയിലെ സ്റ്റേറ്റ് ഫിനാൻഷ്യൽ കോർപ്പറേഷനുകളുടെ മികച്ച പ്രവർത്തനത്തിന് ഒന്നാം സ്ഥാനവും കേരളത്തിലെ പൊതു മേഖലാ സ്ഥാപനങ്ങളുടെ മികച്ച പ്രവർത്തനത്തിന് രണ്ടാം സ്ഥാനവും കെഎഫ്സി കൈവരിക്കുന്നതിൽ നിർണായക പങ്ക് വഹിച്ച കോർപ്പറേഷൻ മാനേജ്മെന്റിന്റെ സമഗ്ര സംഭാവനയ്ക്കാണ് ഈ അവാർഡ്.



നാൻഷ്യൽ ഓഫീസർക്കുള്ള അവാർഡ് കെ സാബു തോമസിനാണ്. കോൺഫെഡറേഷൻ ഓഫ് ഫിനാൻസിംഗ് സർവീസും ചേർന്ന് ഏർപ്പെടുത്തിയതാണ് അവാർഡ്. സംസ്ഥാന സിഎഫ്ഐ സ്റ്റേറ്റ് ഫിനാൻഷ്യൽ കോർപ്പറേഷൻ മികച്ച സിഎഫ്ഐ അവാർഡും ലഭിച്ചിട്ടുണ്ട്. കോട്ടയം ഏറ്റുമാനൂർ സ്വദേശിയാണ്. ഇൻസ്റ്റിറ്റ്യൂട്ട് ഓഫ് ചാർട്ടേർഡ് അക്കൗണ്ടന്റിന്റെ ചടങ്ങിൽ വെച്ച് അശോകി തിരുനാൾ ഗൗരി ലക്ഷ്മി ബായി സാബു തോമസിനെ അർപ്പിച്ചു.









CAST

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#BRINGBACKTHEGLORY

— — — — —
“TOGETHER, LET’S BRING BACK THE
TRADITIONS, VALUES AND GLORY OF ICAI”
— — — — —







#BRINGBACKTHEGLORY



SL. NO.
ON BALLOT
25

“TOGETHER, LET'S BRING BACK THE
TRADITIONS, VALUES AND GLORY OF ICAI”

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THOMAS
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#BRINGBACKTHEGLORY

Why Infographics?

- Infographics offer an easy way for readers to review — and quickly grasp — visualized data.
- They are an engaging way to educate clients and prospects and share your knowledge.
- Infographics are easy to share through email, on your website or through social media.

Infographics Created by AdLift

THE MOMENTUM OF PlayStation®Move

AN IMMERSIVE GAMING EXPERIENCE

PLAYSTATION®MOVE MOTION CONTROLLER

PLAYSTATION®MOVE CAMERA

24 ALMOST ALL MOVIE TITLES AVAILABLE TO BE GAMED

15 HAVE BEEN SELECTED TO BE SCREENED AT THE PIERCE OF THE OSCAR LEAF

30% FEMALE PLAYSTATION MOVE AUDIENCE*

25% OVER THE AGE OF 35

AVERAGE AGE IS 28

HALF ARE PARENTS

60% MORE THAN 60% OF PEOPLE ENTERED FOLLOWING THE PLAYSTATION MOVE ALREADY OWN A PS3

1 MILLION UNITS SHIPPED TO NORTH AND LATIN AMERICA

2X MORE THAN DOUBLED SINCE MAY, PURCHASE INTENT FOR THE PLAYSTATION MOVE A MONG PS3* USERS HAS

QUICK FACTS ABOUT THAILAND

- Population: 67.01 million
- Most popular CITY for Expats: Bangkok
- Currency: Thai Baht

Sony India

THAILAND FOR EXPATS: A PROPERTY RENTAL GUIDE

Quick facts about Thailand

- Population: 67.01 million
- Most popular CITY for Expats: Bangkok
- Currency: Thai Baht

Property Guru

RISING HEALTHCARE COST AND STATISTICS

The healthcare sector in India is estimated to grow to **\$158.2** billion in 2017 from **\$78.6** billion in 2012

While India remains a country with one of the lowest healthcare costs across the world, how much is an average Indian able to afford treatment is another matter. According to WHO, 70% of Indians continue to pay for medical expenses out of the pocket, in comparison to just 30-40% in other Asian countries like Sri Lanka.

86% of rural Indian patients and **82%** of urban Indian patients do not have access to any form of employer-provided or state-funded insurance, according to the latest NSSO survey.

AVERAGE HOSPITALIZATION COSTS (INDIA)

ICICI Lombard

WHAT'S YOUR
FILING STATUS?

THIS DESCRIBES YOUR MARITAL/FAMILY SITUATION

SINGLE



HEAD
of HOUSEHOLD
UNMARRIED BUT
SUPPORTING
A DEPENDENT

MARRIED

filing
JOINTLY or SEPARATELY



QUALIFYING
WIDOWER

once you've determined that

next

GATHER ALL YOUR

INCOME

PAYCHECKS



CASH RECEIVED FOR WORKING



OTHER TYPES OF INCOME

- RENTAL INCOME
- SCHOLARSHIPS
- UNEMPLOYMENT COMPENSATION

FOR MORE REFER
TO IRS PUBLICATION 17



MOVING EXPENSES

TUITION EXPENSES



then

CALCULATE YOUR

ADJUSTMENTS

CERTAIN EXPENSES YOU HAD THROUGHOUT THE YEAR

INCOME minus ADJUSTMENTS equals AGI

ADJUSTED
GROSS INCOME

India's tax 'wows'



Government makes income tax data public



PM Modi calls it 'a big step for transparency'



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Video



Video content is the most popular on the internet. It's easily digestible and people like learning through video. A professional video can provide you with a lot of credibility quickly.



The Institute of Chartered Accountants of India

(Setup by an Act of Parliament)

- **Q. Whether a Chartered Accountant in practice can give public interviews and also whether he can furnish details about himself or his firm in such interviews?**
A. Chartered accountant in practice can give public interviews. While doing so, due care should be taken to ensure that such interviews or details about the members or their firms are not given in a manner highlighting their professional attainments, which may hit clauses (6) and (7) of the First Schedule of the CA Act.

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Webinars Help You Connect With Target Audience?

Whether you choose to offer webinars exclusively to existing clients, referral sources, potential clients or all of the above, webinars will help you connect and engage with your audience.

In this era of constant stimuli and distraction, making yourself or your firm visible and memorable is key.

Webinars, remind existing clients and referral sources that you are still available and staying current.

As for potential clients, you are communicating that you enjoy sharing your in-depth knowledge and experience with others.

Webinars Help You Become the Authority?

Like blog posts, webinars are a platform to help you become the authority on a topic or subject

Let's say you practice GST and you give a monthly webinar about recent updates. Potential clients who have been delaying action or referral sources looking to outsource a complex case may be tuning into your discussion. Your consistent education develops and further establishes you as an authority on the subject matter, resulting in more inquiries and business.

You should convert your webinar information into blog posts each time you host a presentation and also post the video on YouTube

Free Webinar Service: AnyMeeting.com

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If you want to get into their hearts and minds


LinkedIn

WhatsApp Groups

Telegram Channels

Google Groups

Low Cost | Viral | Top of the Mind Recall

 **Susheel Saboo**
Co-Founder at MindMap Consulting
2w · Edited · 🌐

It's really awe struck inspiring to have all together for our annual event at Hyderabad ! Makes me so proud of what we have created together it's really really emotional!

We were discussing our first offsite was 3 cars then 6 cars then min van and this time 2 buses just in Hyderabad!


It's not about how many but what a Powerful energised and excited bunch - so much we can do if all commit as they did. What's even more powerful is we have maintained our family culture despite growing.




I am so energized by what we have in store for us!

Really inspired by what we are together as a MindMap family!


Thanks to all customers who have trusted in us and what we stand for.




Thank you guys for being who u are and being committed to what we are. We at MindMap truly are unstoppable




   152 · 41 Comments

Reactions



 Like  Comment  Share Most Relevant ▼

 13,471 views of your post in the feed

Professional posts do get lot of likes! But inspiring posts gets more shares, views in extended network and connects

13471 views! 150+ Likes - 200+ new connects by just one post!

Some Inspirations

- <https://www.linkedin.com/in/harlinasodhi/>
- <https://www.linkedin.com/in/cadayaniwas/detail/recent-activity/shares/>
- <https://www.youtube.com/anuragsingal>
- <https://www.linkedin.com/in/alokkejriwal/>

What's your identify?

Is your brand equity within boundaries of of your organization?

What steps are you taking to build your identify – Online & Offline?

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5 Reasons to Set Up a Google My Business Profile

#1: Show up prominently in search results across Google.

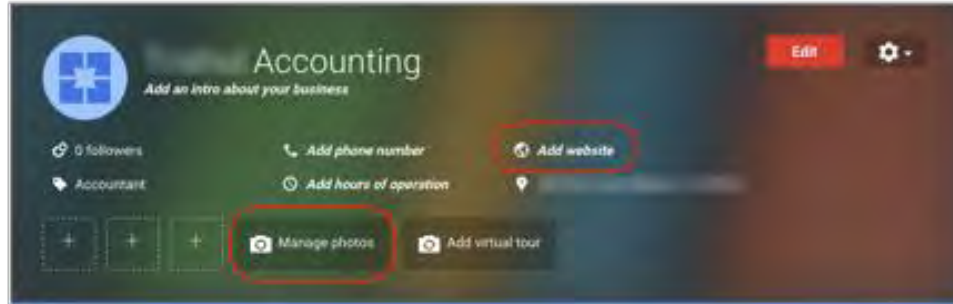
#2: Improve Search Engine Optimization for business web page.

#3: Make it easy for your customers to get in touch by prominently displaying your contact info, and hours of operation on your “My Business” profile widget.

#4: Build your reputation on the web with reviews submitted on your business profile

#5: Get valuable insights on how people find your business and interact with your content, through reports and dashboards.

Implementation Steps



- Claim your Google My Business Profile
- **Add Photos & Videos to your GMB Lawyer profile**
 - a) show your offices on the inside and outside
 - b) show your firms team, partners, and you
 - c) describe the areas of specialization that you practice

Acquire 5-Star Reviews for your Google My Business Listing

You can now add short 30 second videos to your listing.

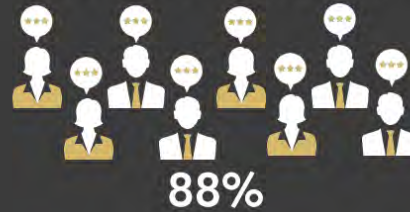
You can also add posts to your listing, so the post will show up under your listing on the google page.

Online Reviews Matter

90% of consumers read online reviews before visiting a business.



88% of internet searchers trust online reviews as much as personal recommendations.



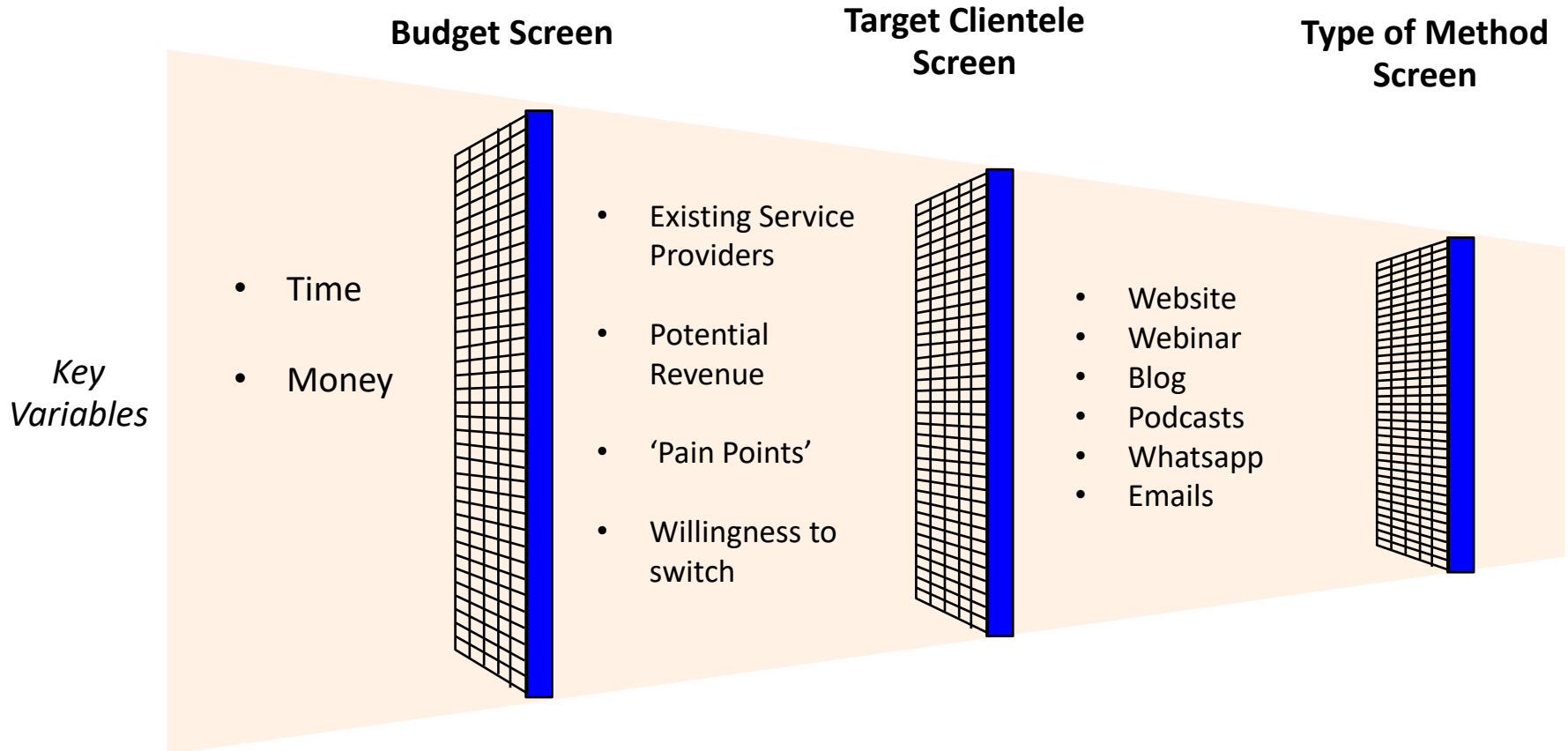
- 90% of internet searchers read online reviews before visiting a business and that those searchers trust online reviews as much as personal recommendations
- Positive comments from clients produce an ~ 20% increase in conversions
- Conversely, 22% of searchers won't call your business (convert) after reading 1+ negative review
- 4 or more negative reviews can decrease your conversion rate up to 70%

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Summing Up

Digital Approach will involve series of bespoke filters



Screening process to result in target focus strategies

Thank You!

