BRANDING FOR CA & CA FIRMS

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#BrandingforCA

THOUGHT LEADERS - BRANDING

"Brand is not a product, it's a promise; a promise of quality, consistency, competency, and reliability." - Harish Bijoor, Brand Strategy Consultant

"Brand is not just a logo, it's the overall impression and experience of a company or product." –
N. R. Narayana Murthy, Co-Founder, Infosys

"Your brand is what other people say about you when you're not in the room." - Harsh Mariwala, Managing Director, Kaya Limited

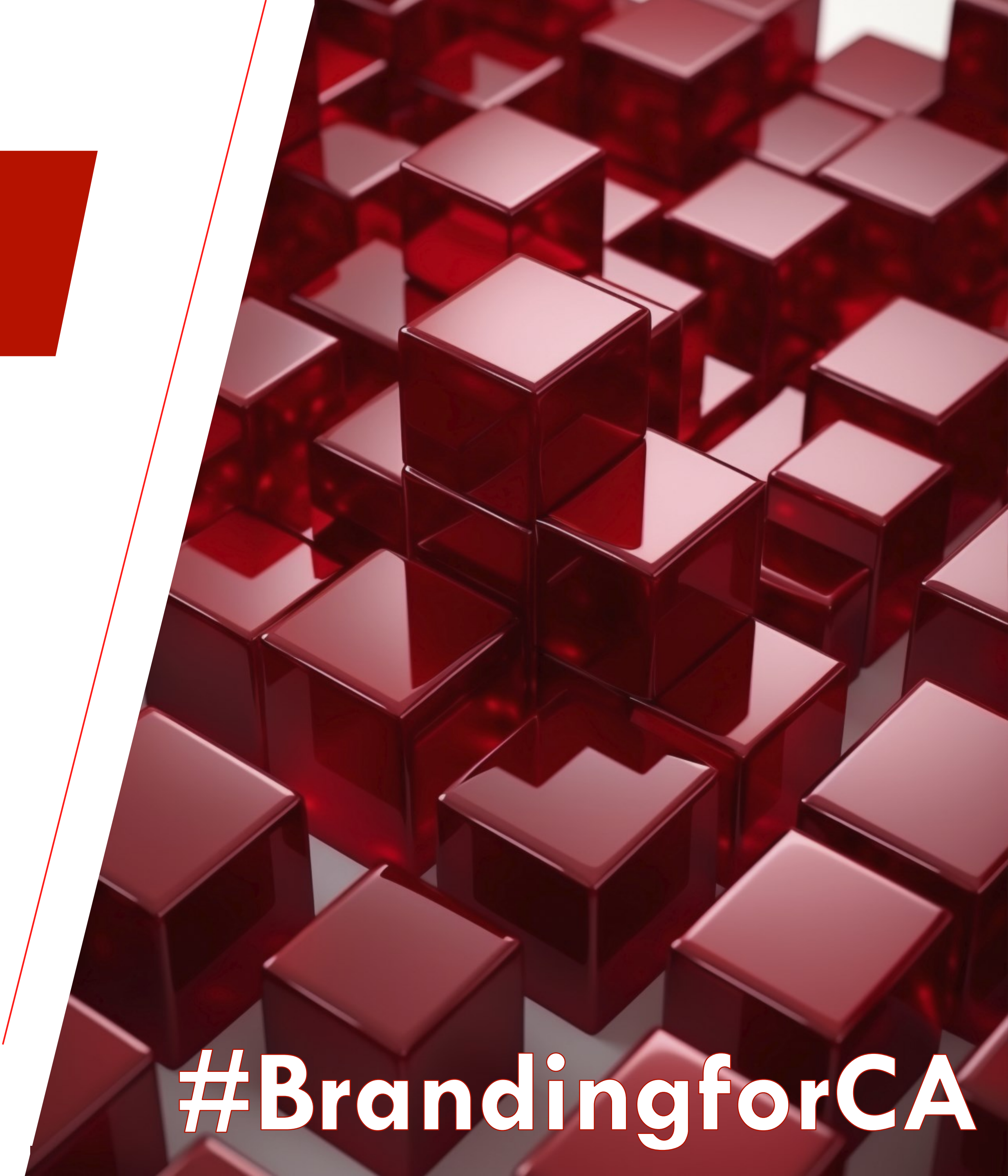
"In the world of branding, if you're not different, you're dead." – Brand Guru Jagdeep Kapoor, CMD Samiksha Marketing

"A brand is a promise, a commitment, a bond, a guarantee." - Rekha Purie, Chairperson, Vasant Valley School

"A brand is not just a logo or tagline; it's an experience and a relationship with the customer." - Ratan Tata

SELF LEARNINGS

- VISITING CARD
- OFFICE
- INFRASTRUCTURE
- PERSONALITY



VISITING CARD

- Carry Adequate No of Cards – Always
- Content – Name, Qualifications, Professional Address, Residential Address (Optional), Email, Mobile, Landline, Website
- Not to Write – Positions Held

BOARD

- Both at Office & Residence
- Good Quality, Prominent
- Small Size is Good (Max – 2 Ft X 1 Ft)

OFFICE

- Air Conditioned (A/C)
- Library (Book-Shelf in Meeting Rooms / Cabins)
- Display in Office – Medals, Certificates, Photos with Prominent People, Values, Ethical Principles, Technical Infographics, etc
- Good Infra including Server and IT Systems
- Clean & Tidy Environment

NO कंजूसी IN तेल AND मेल !!

- No Hesitation to Meet
- No Hesitation to Travel – Inter-State & Locally

HOW TO INCREASE YOUR CONNECTS

- Meet More and More People
- Join Social / Religious / Political / RWA / Chamber of Commerce / Trade Associations / Rotary / Other Similar Organisations
- Develop Personality
  - Clean & Formal
  - Whenever Possible - Wear Suit & Tie or Jacket
- Participate in all possible Get Togethers
- Exchanging Cards / Contacts etc
- Introduce yourself & Give them your Card
- Don’t Ask for Work
- Sometimes
  - Can Offer Help, or
  - Subtly mention about some good work done or special planning for some client (without mentioning Name of Client) – As per Decorum

CERTAIN ATTRIBUTES TO IMPROVE BRAND

- Client Never Gives you a “Second Chance”. “First Chance” is your only and “Best Chance”
- Initially
  - Every Client may give you
  - “Small Job” which may not be very “Remunerative”
- If you Do..
  - A “Small Job” well – 2-3 Times, then you will,
  - Surely Get “Better” & “Larger Jobs”
- No Client is a “Small Client”
- Client is your “Biggest Brand Ambassador”
- A Client can give “Good” Reference

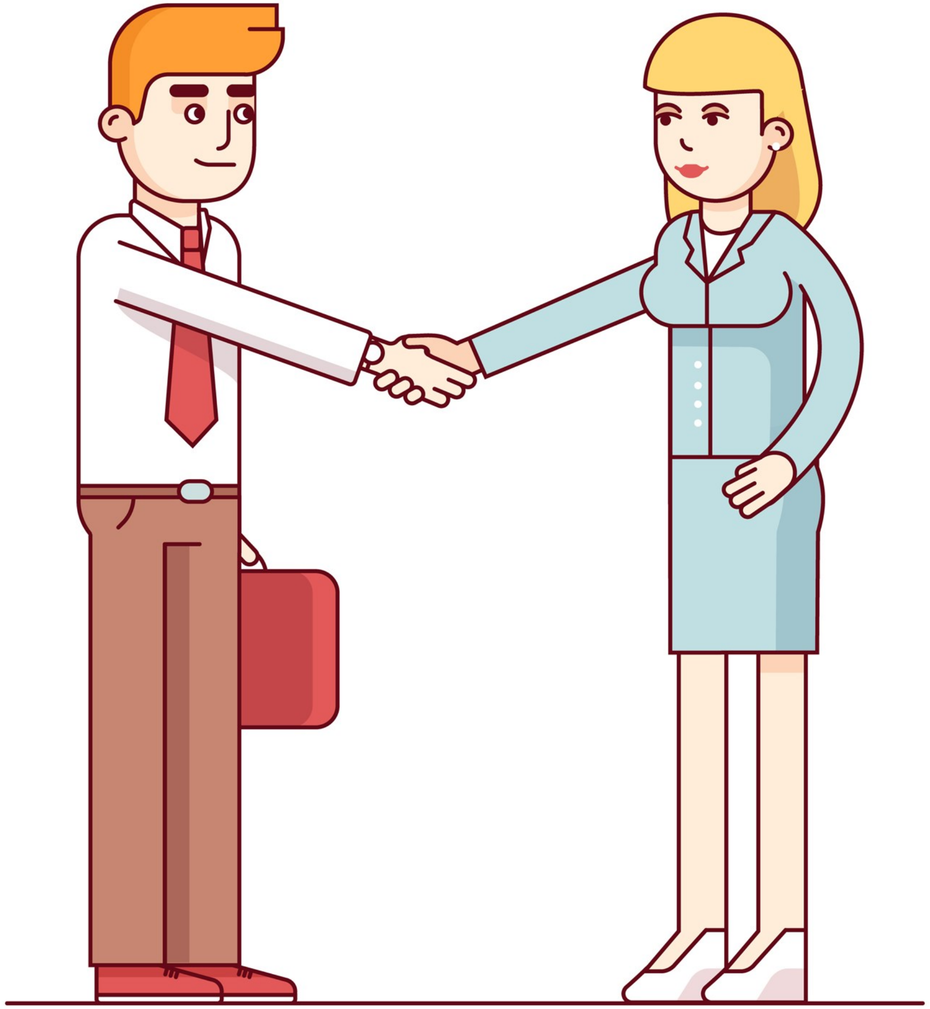
CERTAIN ATTRIBUTES TO IMPROVE BRAND

Your "Brand" is your "Conduct" and way you "Service" your "Existing Client"

- Quality
- Consistency
- Competency
- Reliability
- Honesty
- Diligence
- Integrity
- Confidentiality
- Sincerity

CERTAIN ATTRIBUTES TO IMPROVE BRAND

- “Patience” – Must Have
- Learn to Say “No”
- Client comes to you for “Independent Professional Advise”
- Don’t Try to Please the client
- Don’t Try to “Do” everything “He” asks for.
- No Emotional Attachment with “Client”
- Professional Need to “Draw a Line”
- No “Client” to take you “For Granted”

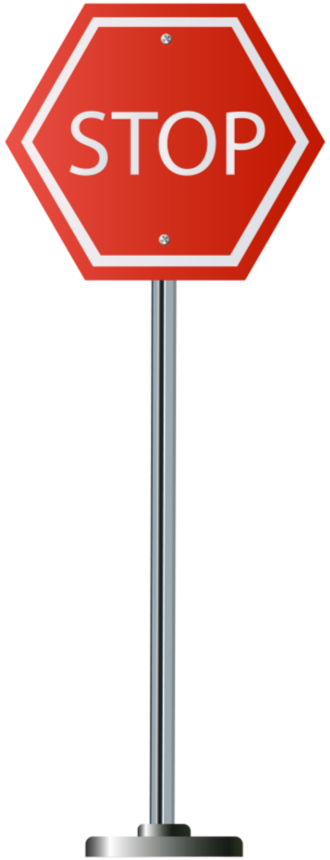


HOW TO CHARGE ADEQUATE FEE ?

- Communicate "Scope of Work"
- Communicate "Deliverables"
- "Don't" Oversimplify Job
- Tell him Implications of Improper Handling including Penalty, Fine, Prosecution & Arrest

REGULATORY FRAMEWORK

- **Clause (6) of Part I of the First Schedule to The Chartered Accountants Act, 1949** - the members are prohibited from soliciting clients or professional work either directly or indirectly by circular, advertisement, personal communication or interview or by any other means.
- **Clause (7) of Part I of the First Schedule to the Chartered Accountants Act, 1949** - This clause prohibits advertising of professional attainments or services of a member and restrains a member from using a designation other than that of a CA on professional documents.
- **Use of Logo –** No Logo other than CA Logo to be used.
- **Guidelines**
  - Website
  - Board
  - Advertising

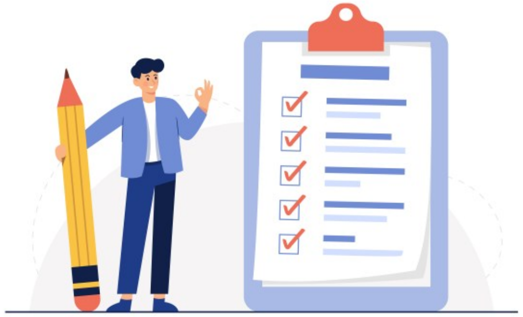


GUIDELINES FOR ADVERTISING

(Issued Pursuant to Clause (7) of Part I of the First Schedule to the Chartered Accountants Act, 1949.)

The Members may advertise through a write up setting out their particulars or of their firms and services provided by them subject to the following Guidelines and must be presented in such a manner as to maintain the profession's good reputation, dignity and its ability to serve the public interest.

1. Contents of Write Up – True and Correct
2. The write-up should not
    1. claim superiority over any other Member(s)/Firm(s).
    2. be indecent, sensational or otherwise of such nature which may likely to bring the profession into disrepute.
    3. contain testimonials or endorsements concerning Member(s).
    4. contain any other representation(s) that may like to cause a person to misunderstand and/or to be deceived.
    5. violate the provisions of the 'Act', Rules made there under and 'The Chartered Accountants Regulations,1988'.
    6. include the names of the clients (both past and present)
    7. be of font size exceeding 14.
    8. contain any information other than stated in Next Slide.
    9. contain any information about achievements / award or any other position held.
3. The write-up must contain Membership No / Firm No (Mandatory)



The Write Up can contain following information: -

For Members	For Firms
Name Chartered Accountant Membership No. with Institute Age Date of becoming ACA Date of becoming FCA Date from which COP held Recognized qualifications Languages known Telephone/Mobile/Fax No. Professional Address Web E-mail C A Logo Passport size photograph Details of Employees (Nos. -) Chartered Accountants - Other Professionals – Articles/Audit Assistants Other Employees Names of the employees and their particulars on the lines allowed for a member as stated above. Services provided ………………………………. ………………………………. ……………………………….	Name of the Firm Chartered Accountants Firm Registration No. with Institute Year of establishment. Professional Address(s) Working Hours Tel. No(s)/Mobile No./Fax No(s) Web address E-mail No. of partners Name of the proprietor/partners and their particulars on the lines allowed for a member as stated above including passport size photograph. C A Logo Details of Employees (Nos. -) Chartered Accountants - Other professionals – Articles/Audit Assistants Other employees Names of the employees of the firm and their particulars on the lines allowed for a member as stated above. Services provided: ………………………………. ………………………………. ………………………………. The write-up may have the Signature, Name of the Member/ Name of the Partner signing on behalf of the firm, Place and Date.

WEBSITE GUIDELINES

(Issued by the council and amended up to 345th Meeting held in August 2015)

The amended guidelines issued by the Council are as under:

1. The Chartered Accountants and/or Chartered Accountants' Firms would be ***free to create their own Website***
   1. In **Compliance with Guidelines** of Council
   2. **No Prescribed Format:** The actual format of the Website is not being prescribed nor any standard format of the Website is being given to provide independence to the Members.
   3. There is **no restriction on the colours** which may be used in the Website.
2. Individual Members would also be permitted to have their Webpages in their **trade name** or **individual name.**
3. Websites are run on a "pull" model and not a "push" model
4. Cannot advertise to seek / solicit visit to website.

Contents of the Website

(i) Member/Trade/Firm name.

(ii) Year of establishment.

(iii) Member/Firm's Address (both Head Office and Branches) Tel. No(s) Fax No(s) E-mail ID(s)

(iv) Nature of services rendered (to be displayable only on specific "pull" request)

(v) Partners – Name, Year of Qualification, Other Qualifications, Telephone Off, Res, Mobile, Email, Address, Area of Experience (in Specific "Pull" request mode)

(vi) Details of Employees - Name, Designation, Professional, Area of Experience (in Specific "Pull" request mode)

(vii) Job vacancies for the Chartered Accountant/firm of Chartered Accountants (including articleship).

(viii) No. of articled clerks. (to be displayable only on specific "pull" request).

(ix) Nature of assignments handled (to be displayable only on specific "pull" request).

WEBSITE GUIDELINES (Contd.)

(Issued by the council and amended up to 345th Meeting held in August 2015)

Don'ts

- No Logo other than CA Logo issued by ICAI permitted to be used on Website
- No Advertisement on Website

Do's

- Display of Passport size photograph is permitted. (of Partner(s) / Proprietor)
- Blog / Updates / Bulletin Boards - The members may include articles, professional information, professional updation and other matters of larger importance or of professional interest.
- The chat rooms can be provided which permit chatting amongst members of the ICAI and between Firms and its clients. The confidentiality protocol would have to be observed.
- Can provide on-line advice to their clients who specifically request for the advice - Free / Paid.
- Limited Search Engine Listing Permitted

*Note: Disclosure of names of clients and/or fees charged, on the website is permissible only where it is required by a regulator, whether or not constituted under a statute, in India or outside India, provided that such disclosure is only to the extent of requirement of the regulator. Where such disclosure of names of clients and/or fees charged is made on the website, the member/ firm shall ensure that it is mentioned on the website [in italics], below such disclosure itself, that "This disclosure is in terms of the requirement of [name of the regulator] having jurisdiction in [name of the country/ area where such regulator has jurisdiction] vide [Rule/ Directive etc. under which the disclosure is required by the Regulator].

SIGN BOARD & Other Matters

Sign Boards

- CA can exercise their own discretion and good taste while keeping in mind the appropriate visibility and illumination (limited to the sake of visibility).
- Use of **glow signs** or lights on **large-sized boards** as is used by traders or shop-keepers is **not permitted**.
- CA can put the name plate at his **residence** with the designation Chartered Accountant but cannot use his firm name.

Other Matters - Published in February, 2010 issue of the CA Journal

(Source: https://icai.org/post.html?post_id=5644)

Question	Answer
If a member is a partner in more than one firm, is it permissible to print the names of all the firms on visiting cards, letter-heads, stationery etc.?	Yes, there is no prohibition under Clause (7) of Part I of the First Schedule to the CA Act.
Whether the office of a Chartered Accountant is permitted to go in for ISO 9001: 2000 certification or other similar certifications ?	Yes, there is no bar for a member to go in for ISO 9001:2000 certification or other similar certifications .However, the member cannot use the expression like "ISO Certified" on his professional documents, visiting cards, letter-heads or sign boards etc.

Other Matters - Published in February, 2010 issue of the CA Journal (Contd.)

(Source: https://icai.org/post.html?post_id=5644)

Question	Answer
Whether a Chartered Accountant/Firm is permitted to use logo on letter-heads, stationery, etc.?	No, the use of logo/monogram of any kind/form/style/design/colour etc., whatsoever, on any display material or media e.g. paper stationery, documents, visiting cards, magnetic devices, internet, signboard by the Chartered Accountant firm of Chartered Accountants is prohibited. Use/printing of member/firm name in any other manner tantamounting to logo/monogram is also prohibited. However, a common CA logo has been allowed to the members, provided it is used in correct manner within terms of the Council Guidelines.
If a member has passed any additional course of the ICAI, is he permitted to print such qualification on visiting cards, letter heads and other stationery?	Yes, under Clause (7) of Part I of the First Schedule to the CA Act, a member is permitted to print such qualification on the visiting cards, letter heads & other stationery. However, he cannot use the designation 'Information System Auditor' or the like.

Other Matters - Published in February, 2010 issue of the CA Journal (Contd.)

(Source: https://icai.org/post.html?post_id=5644)

Question	Answer
Whether public notice published in the newspaper by a Chartered Accountant individually or jointly with an Advocate in respect of acquirement of land by their client is permitted?	Yes, in terms of the Guidelines under Clause (7) of Part I of the First Schedule to the CA Act, as appearing at page 156 of the Code of Ethics, 2009, the public notice published in the newspaper in respect of acquirement of land by their client is permissible.
If a member has passed any additional course of the ICAI, is he permitted to print such qualification on visiting cards, letter heads and other stationery?	Yes, under Clause (7) of Part I of the First Schedule to the CA Act, a member is permitted to print such qualification on the visiting cards, letter heads & other stationery. However, he cannot use the designation 'Information System Auditor' or the like.

Sponsoring Activities

- **Event Sponsorship:** CA or CA Firm is not permitted to sponsor an event except a Program hosted by a PoU of ICAI with prior Approval of CPE Directorate.
- **Sponsoring CSR Activities:** Members sponsoring activities relating to Corporate Social Responsibility may mention their individual name with the prefix “CA”. However, the mention of Firm name or CA Logo is not permitted.

Digital Branding for the CA Firm

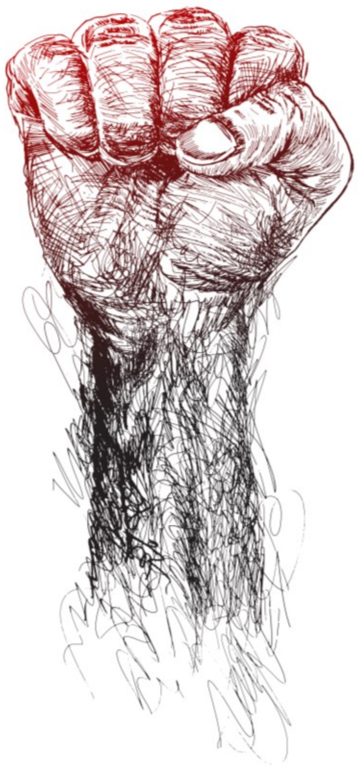
within the ambit of ICAI regulations

#BrandingforCA

DIGITAL MARKETING IS BAD! ITS NOT FOR ME!
NOT MY CUP OF TEA (OR COFFEE!)
AND ITS AGAINST ICAI REGULATIONS…

ICAI Permits us to have: -

- Website
- Social Media Pages – LinkedIn, Facebook, Instagram, X (Twitter)
- Publish Blog / Articles – Professional Updates, Regulations and Critical Issues
- YouTube Channel – Record and Release Educational Updates
- Webinars – For Clients & Fellow Professionals
- Google My Business Listing



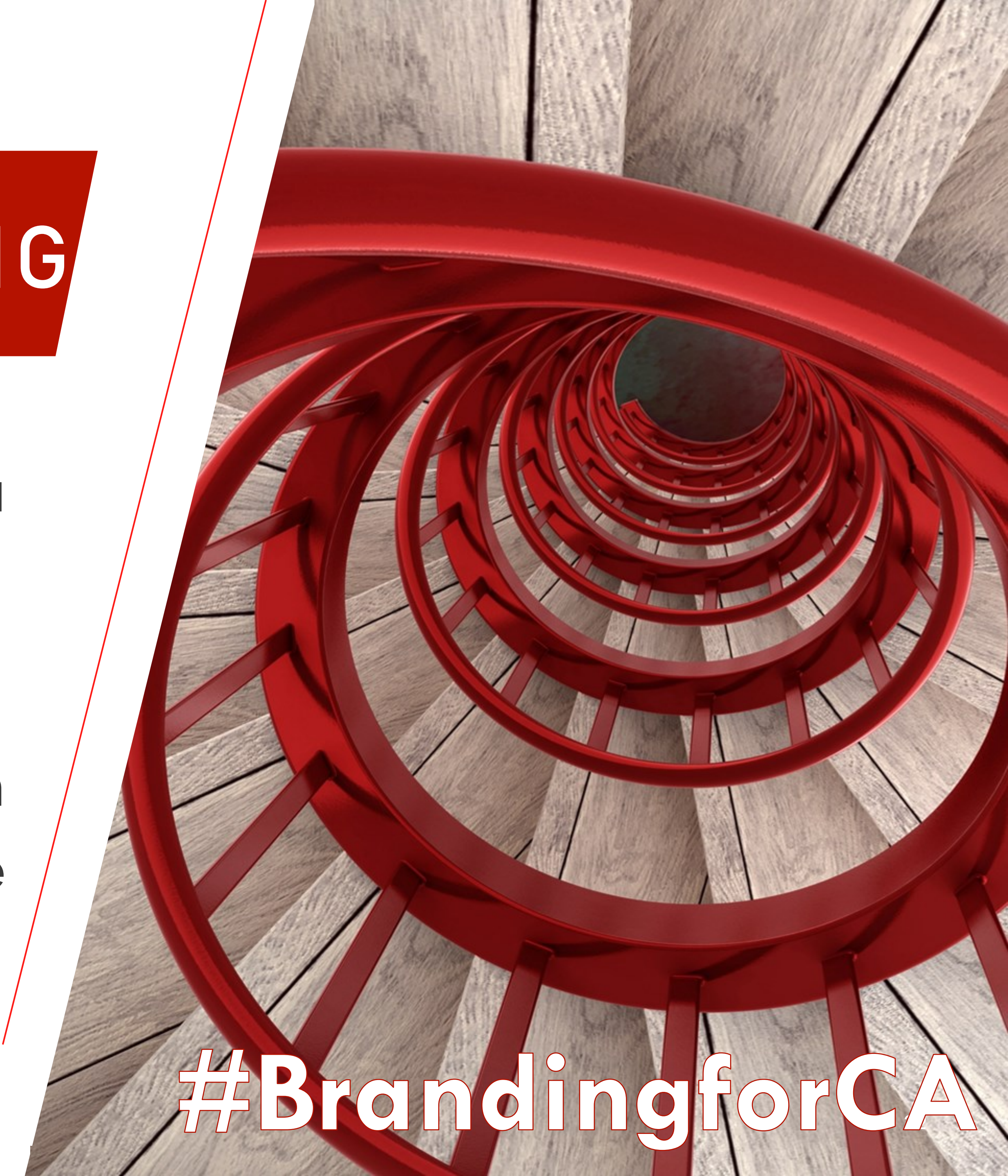
7 PRINCIPLES OF SUCCESS

1. Content
2. Community
3. Creativity
4. Communication
5. Consistency
6. Collaboration
7. Connections

PERSONAL BRANDING

Q: Why should CAs build a sound personal brand?

A: Clients don't work with firms; they work with a face whom they trust.



AS A CHARTERED ACCOUNTANT, WHEN YOU BUILD A SOUND PERSONAL BRAND, IT UNLOCKS THE FOLLOWING OPPORTUNITIES FOR YOU AND YOUR FIRM:

- Acquire clients from all industries and of all sizes.
- Become a keynote speaker in trade shows, industry seminars, and professional events.
- Collaborate with other CAs, lawyers, and professionals to expand your presence.
- Hire better talent because interns and employees are always excited to work with a firm they've previously heard about.
- Get involved in paid consulting sessions to mentor young professionals.

HOW CAN CHARTERED ACCOUNTANTS BUILD THOUGHT LEADERSHIP?

- Publish articles in
  - CA Journal
  - Newspapers and Industry-specific magazines
- Appear on TV Shows as Expert Panelist
- Get active on online forums: CAclubindia, TaxGuru, CASansaar, ExpertsPanel, Quora etc. are renowned online communities where people ask queries and find solutions to their problems. By answering these questions and solving people's problems, you can build a genuine community and add value to people's lives.
- Post consistently on social media platforms – The most useful being LinkedIn

HOW TO BUILD YOUR PROFESSIONAL BRAND ON LINKEDIN?

Engaging Content

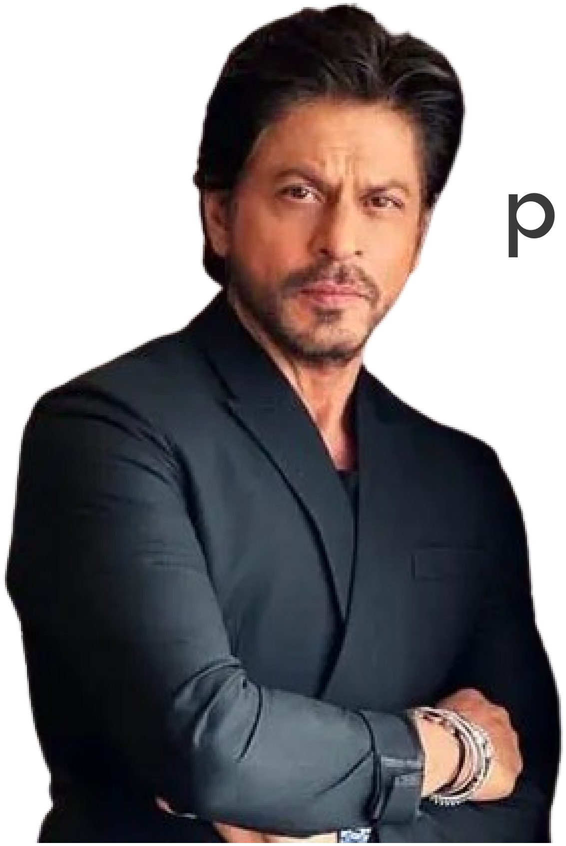
Personal Rapport

Micro Influencing

- Myth: I need thousands of connections to become Brand?
- Truth: No, LinkedIn does not show all your posts to all connections. Particularly those with URLs get penalized by LinkedIn, because it takes users outside the platform.
- You need to have relevant followers for your business.

LET'S DO SOME PRACTICAL | HAND'S ON

- Create a Business / Firm Page on LinkedIn
- Search Connections – Alumni of College, School, ICAI Batchmates
- Improve your LinkedIn Profile
  - Add New Skills
  - Update Education / Certificates
  - Update Contact details
  - Create Headline
  - Custom URL



> "Brand is just a perception, and perception will match reality over time."

Shah Rukh Khan
one of Bollywood's most iconic actors

THANK YOU

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