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A SOLUTION TO THE MARKETING VS. SALES CONUNDRUM

The Association for Accounting Marketing Helps CPA Firms Define Roles

As dedicated marketing and sales professionals increasingly supplement the partners and managers in generating new clients and engagements, a question emerges: “What marketing and sales roles do we need and when?”

The Association for Accounting Marketing, in collaboration with ConvergenceCoaching, developed a white paper to address this issue. [“Marketing and Sales Roles in Accounting”](#) aims to answer these burning questions:

- What marketing and sales roles do we need?
- How and when do we fill them?

This 11-page document is intended to answer this question and provide guidance regarding the various marketing and sales roles a firm may have, how these roles may be measured and the timing you may consider when adding these positions in your firm to achieve your business development goals.

“We are so pleased to provide this valuable resource to help accounting firm leadership identify and define the duties and responsibilities for their current and future marketing and sales roles. This document also provides concrete ideas for measuring the success of these personnel, which until now, has been difficult to find combined in one document,” said Julie Tucek, president of the Association for Accounting Marketing. “We plan to expand the scope of the white paper in the future by including compensation considerations from an upcoming survey that the Association for Accounting Marketing will conduct to gauge marketing and sales compensation trends among members.”

“In this economy, growth is critical to the success of any business. CPA firms recognize the need to increase their commitment to marketing and business development by dedicating resources to these functions,” said Tamera Loerzel, partner of ConvergenceCoaching. “This white paper is intended to help firms define those responsibilities and ensure someone in their firm clearly owns each.”

The “Marketing and Sales Roles in Accounting” white paper can be downloaded for free at www.accountingmarketing.org. For more information about the Association for Accounting Marketing, visit www.accountingmarketing.org.

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The Association for Accounting Marketing is the only association in the country formed specifically to provide accounting marketers with the tools for professional growth and success. The association's more than 800 members are comprised of marketing professionals, CPAs, consultants, vendors, educators and students who seek to expand the business of public accounting. Since 1989, AAM has provided members with the information, resources and market intelligence needed to excel and grow in their careers. To learn more about AAM, please call 856-793-0806 or visit accountingmarketing.org.