



25 Things I *WISH* Someone would have told me when I Started in Accounting Marketing!

*Art C. Kuesel & Sarah Johnson,
Directors of Marketing Consulting
Services, PDI Global, Inc.*

Who are Art & Sarah?

- **Art Kuesel**, Director of Consulting Services
- *I LOVE CPAs!*
- 11+ years of experience in CPA firm marketing and Bus Dev.
- Business development, marketing, growth strategies, niche building infrastructure, coaching, training and branding
- **Sarah Johnson**, Director of Consulting Services
- *FIERCE tri-athlete!*
- Significant experience in operations and marketing
- Website dev, social media, e-Strategy, marketing infrastructure, lead generation, and training.

Where we're Headed Today

- 25 (or more) things I wish someone would have told me when I started in accounting marketing.
 - Grouped as; Relationships, Strategy/Planning/M Measurement, What Drives the Partners, Keys to Success, and Personally Speaking
- >>>>Seasoned Marketers Ask Yourself
- What can I re-learn? Where have I become complacent?
- >>>>Newer Marketers Ask Yourself
- What can I learn and implement to make my career better and more fruitful?

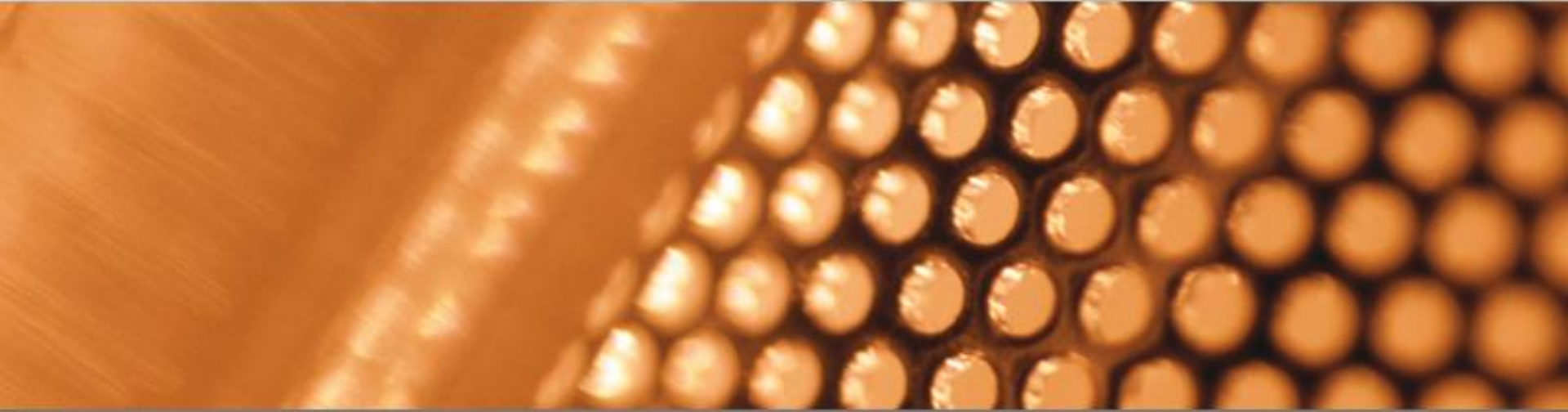
What Inspired this Session?

Why the heck would you put on a session like this?

- Our passion and excitement for the industry?
- Our dedication to AAM?
- Our love of teaching?

Orrrrrr.....

- **Potentially career ending move(s) we made “back in the day?”**



Relationships

Interview each Partner

- Find out what they expect from marketing
- Find out how they think
- Determine if they will be friend or foe
- Determine if they would make a good champion
- Find out about their successes and failures (marketing)
- Learn about their marketing fears

Find and Focus on Champions

Gain support for major firm-wide initiatives by aligning with a few champions and active supporters. Strive for small victories that can be promoted to help others see how their lives will be better if they get on board.



D. Scott Moore

*Director of Marketing and Business
Development*

Dixon Hughes PLLC

Remember, that in a Partnership...

Dear Greenhorn: Understand that accounting marketers are like UFOs. Half of the Partners will believe in you, the other half won't



Unattributed
fellow AAM member

BUILD Relationships

- Lunches, coffee, you name it
- It's the GREASE that runs your marketing function
- It enhances and increases buy-in for your marketing initiatives
- Get to know them personally, not just professionally – In so many cases their work IS their life.
- While your primary focus will be the partners, don't ignore the professional staff
- Find ways to “start them young” and integrate them into the marketing culture you are trying to build

Clarify Expectations with Everyone

Expectations are a funny thing, they vary greatly by person and project. My partners and managers each defined success differently. Clarify expectations with each person and around each project.



Strategy, Planning & Measurement

You Can't be Everything to Everybody

Outsourcing certain tasks instead of trying to be a “jack of all trades” is an appropriate tactic to meet deadlines while ensuring quality. Developing a network of reliable external vendors and internal resources can prove invaluable.



Georgina Giannelli

Senior Marketing Manager

Baker Tilly Virchow Krause

Set Annual goals to be Measured Against

- Setting goals enables you to:
 - Secure marketing dollars (and a marketing budget) to achieve the goals
 - Measure marketing success at the end of the year
 - Measure personal success at the end of the year
 - Demonstrate ROI
 - Earn trust and recommitment to future marketing initiatives
 - What else?

Know why you are Doing Everything you are Doing at all Times

You need to defend against the partner naysayers who will ask you about everything. You need to be prepared with the right answer. This will build your credibility and may even prevent another such “attack” in the future.

Prioritize Effectively

- Don't fall into the trap of doing too much, because you will either work yourself to death trying to accomplish everything or will not achieve your goals
- Ask yourself, with every activity that you undertake, will this help me accomplish my overall goals?
- Discuss your to-do list with the partner in charge of marketing monthly and talk about strategic vs. non-strategic activities
- Don't wait until the end of the year to find out that you will miss your goal and that you have spent your time on things that didn't truly matter to the partners

Know who the Firms' "A" clients are

- Get to know all firm A and B clients (or at least those in your region)
- Facilitate client satisfaction interviews with the firms' "A"clients

Learn to Say No

Learn to Say “No.” There are a million marketing ideas and a lot of partners with their own agendas to drive their practices. Understand the most important factors to driving growth for the firm as a whole and stick to those activities and do not stray.



Lori Colvin

Partner and CMO

Armanino McKenna

Meet with Upper Management

Suggest meeting with your superior/managers once a month to make sure upper management understands in the firm's marketing initiatives and current projects, how they can get involved, and most importantly that you don't just plan parties all day long. This will help you gain buy-in.



Lisa Weiss

Director of Marketing and Communications

McQuade Brennan LLP

Build Processes to Ease the Pain of Unexpected Last Minute Requests

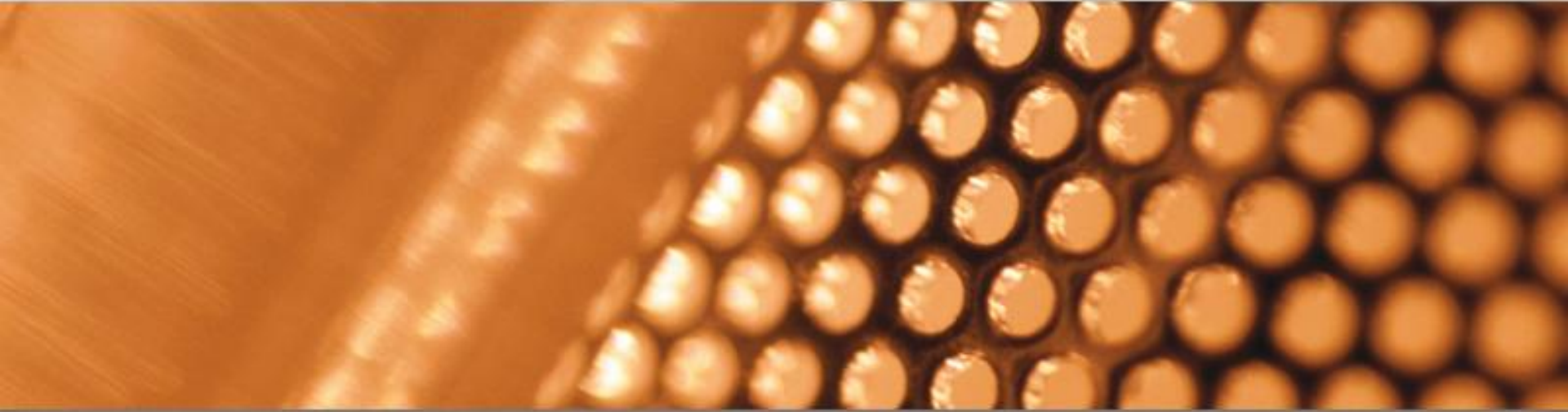
As marketers, we understand that the best opportunities are not always planned. We may get an impromptu request to write a story, be interviewed for a story, contribute at a last minute event, etc. CPAs are often hesitant about last minute opportunities, worrying that they are “not prepared enough.” Developing as many planned, ongoing processes (articles, speaking engagements, networking events, firm’s benefits messages, etc.) as possible can help the anxiety that many CPAs feel with impromptu opportunities.



Brenda Olesuk

Director of Marketing

Meyers Brothers Kalicka



What Drives the Partners

It's the Clients, Silly.

- When clients' say "jump," partners say "how high?"
- Billable hours are king, marketing hours are queen
- Most of them have a tremendous amount of passion for their clients and practices
- Figure out a way to tap into this!

Learn the Language

Get to know the terminology and speak the language. They will respect it and trust that you understand the business.



Leisa Gill

Director of Marketing

LBMC

Know what's Going on in the Industry

Marketers need to stay in up to date on changes in the industry to find ways to take a compelling event such as legislation changes or a shift in market conditions to communicate a timely and relevant position on how the firm can drive value from the circumstances.



Erinn Keserica

Director of Marketing

Frazier & Deeter

Marketing is about increasing the value of the firm

Ultimately, the partners employ marketers to increase the value of the firm.



Marc Busny

*Managing Director and CMO
CBIZ Tofias & Mayer Hoffman
McCann, P.C. – Tofias New
England Division*

Build better leaders

As a non-CPA, non-partner in a firm, I should use my leadership skills to build better leaders by encouraging them to take risks, invest in an idea, a person, a market, a product. I have had good success doing just that within my firms.



Unattributed
fellow AAM member



Keys to Success

Know what will fly and what won't – be flexible

Situation: New Marketing Director at a 90 person firm

Goal: Educate the partners on what a “real” marketing director does and doesn't

Partner says: Who will be helping with all of our proposals?
The old marketing director did that for us...

I say: I don't know who is going to do that, but it's not going to be me.

Later that day...

Read, Read, and Read More

The accounting industry is constantly changing and you need to stay abreast of what's happening in order to do your job better. Setting aside 30-60 minutes a day to read not only about accounting marketing, but accounting as a whole will make you a better professional. Don't feel guilty about working on you.



Katie Tolin
Marketing Director
Rea & Associates, Inc.

You often have to TEACH before you can MARKET...

Learn how to <delicately> educate someone about marketing (who thinks they already know everything there is to know about marketing).



Tom Ogden

*Director of Marketing and Business
Development*

Corbett, Duncan & Hubly PC

You have to SELL before you can MARKET

Learn how to sell marketing initiatives to your partners in terms they can understand. Use highly measurable and quantifiable information. If you can't effectively sell it, you will have a hard time moving forward.



Lynn Fasi

Former National Marketing Director

Clifton Gunderson, LLP

Present your Ideas in Final Form only

To minimize confusion or missed expectations in terms of visualizing what something will look like or how a program will work, present your ideas and concepts in the most final form possible.



Kayte Steinert-Threlkeld
Chief Marketing Officer
Anchin

At the end of the day, you need to let go

With any project, there's that moment where you have to let go and rely on other people. You can point your CPAs in the right direction and give them all the resources they need to succeed, but you can't force them to follow a plan or even guarantee positive results if they do. It's a frustrating lesson, one that can take a long time to sink in, but it is critical to motivating your team and empowering them to play a role in the firm's successes.



Kristen Lewis

*Director of Marketing and Communications
Amper, Pultziner & Mattia, P.C.*

The Partners are your Products

“Senior managers, too, of course. But the truth is this: Clients and prospects are buying a relationship (likability, respect, etc.), not a product or a promise of a specific deliverable. Don’t lose sight of this, or you may struggle.”



Stuart Baum
Director of Marketing
Blackman Kallick

Be PROACTIVE in offering ideas that can help the firm...and yourself!

Once you're settled in at your firm, find your passion and ask to do more of it. You will become more valuable to your firm and will increase your personal satisfaction with your career.



Courtney Fujara
Legacy Professionals, LLP

“What can we do to Grow the Bottom Line of the Firm?”

I have always approached my role at my firm as one of helping the partners grow the firm, for the benefit of the firm and thus, the partners. I look at it like this: What can we do to grow the bottom line of the Firm? Does this (project, idea, piece of new business) make sense for the Firm and where we want to go? It is always about what makes sense for the Firm's success. You need to become a trusted advisor to the partners at your own Firm.



Julie Tucek

Legacy Professionals, LLP

Spend the firms' money as if it were your own

- How many times have we heard this?
- How can we demonstrate that we live by this motto?
 - When presenting options always have a more expensive option
 - Don't feel obligated to spend your entire marketing budget
 - Produce a budget-to-actual report at the end of the year



Personally Speaking

Don't say "Whatever" aloud

- Situation: A new tax manager in the Milwaukee office failed to get me what I needed to complete her professional bio. *This went on for six months.*
- The tax partner and rainmaker in our office asked me for her bio for a proposal and I said it wasn't done.
- When he replied unfavorably, I told him that I had been trying for a while and was unsuccessful (and was somewhat insulted by her arrogance and ambivalence)
- He said try harder, I need it by Friday
- I replied "whatever"

Listen

We teach our CPAs to listen to their clients and prospects to learn what they need and where they are coming from. The same applies to your position, as your client, it is imperative that you listen to your CPAs, get their feedback, ask them what they see in the marketplace and engage them in your plan. You will learn a lot and it will help you accomplish your goals.



Kristen Lewis

*Director of Marketing and Communications
Amper Politziner & Mattia, P.C.*

Show commitment to the career (*in terms that an accountant can understand*)

- Occasionally, come in early and stay late
- Work a few Saturdays during tax season
- Send emails outside the 9-5 window of time
- Be FLEXIBLE – this ain't no 9-5 job

Stay as close to the front lines as possible

The closer you can get to actually bringing in revenue, the better.



Colleen Kuesel

Business Development Operations Leader

Ernst & Young

Have F - U - N

Have fun. We're not saving lives, we're marketing for accounting firms.



Mr. Like D. Bananas

Director of Visitor Entertainment

Lincoln Park Zoo

Celebrate successes

- Find a way to recognize marketing successes and celebrate them
 - “Another marketing success” email
 - Informal “get-togethers” and announcements in the conference room (cooler of beer and bag of Doritos)
 - Presentations at partner meetings, sales meetings

What did we miss?

Q&A





Thank you.

PDI Global, Inc.

625 N. Michigan Avenue, Suite 2100

Chicago, IL 60611

Art: 312.208.8774 or akuesel@pdiglobal.com

Sarah: 312.245.1681 or sjohnson@pdiglobal.com