

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Be Different:
Understand the unique value of your
firm beyond the cliché-speak of
most CPA firms

Presented by
Wendy Nemitz

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

What is a competitive differentiator?
What is a key theme or message?
What is a tagline?

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Who is Ingenuity?



THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success





Wendy Nemitz

- M.A. in Leadership
- Professional service marketing since 1987
- Leadership and succession coach
- Worked with more than 100 professional service firms
- Wrote "Leadership: A New Conversation."
- Co-wrote: "High Impact Marketing for Professional Service Firms."



THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success




Why should you care?

Prospects
Acquisitions / Mergers
Recruiting
Current Clients

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

- 63% of CPA firms are not investing enough time on cross-selling and up-selling
- 80% will drive growth in 2010 by cross-selling existing services.
- Firms lack both skills and time commitment to cross-selling.

--L. Harris & Associates, 2010

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Write Down

What makes your firm so special?

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Is it...

Client service: we go above and beyond for our clients.

Expertise: We really know our stuff.

Quality: We provide the highest quality of work.

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

How about:

Big enough to serve you, small enough to know you.

Trusted Advisors

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
 Marketing Group, LLC

The conversation in your firm

Does not cut it

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
 Marketing Group, LLC

Differentiation Circles

Firm View

Competitive View

Client / Prospect View

Community View

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
 Marketing Group, LLC

Differentiation Circle: Your Firm

- Founding stories / context
- Leadership interviews
- Team focus groups or surveys
- Aspirations and vision

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success




INGENUITY
Marketing Group, LLC



Myth #1: We Know Us

Partner #1 says:
"We have won numerous awards."

Partner #2 says:
"We win big settlements."




THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

What did the clients say?

"I never wanted to sue anyone.
At the worst time in my life
these people saved us."



THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success




INGENUITY
Marketing Group, LLC



THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Before



After




THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Myth #2: Partners can articulate
our value

Almost all senior leaders in
CPA and law firms tell us
the younger people
cannot sell.




THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Our result:

Younger people are BY FAR
better salespeople




 THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success




Differentiation Circle: Your Clients / Prospects

- Client Conversations / Interviews
- Prospect Perspectives




 THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success




Client Conversations

- The Political Roadblocks
- Best Practices in Calling:
 - Personal visits
 - Outside callers, journalists
- Questions to Ask




 THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success




Client Conversations

Of all the projects (this firm) has done, what has made the most difference for you?
 Can you describe a time when they really came through for you? (client anecdote or experience)
 Who is your primary relationship at the firm? How would you describe that relationship? How would you describe your relationship with other people there?
 What do you think this firm does best? What are the strengths? Are there any weaknesses at the firm? Any service or other issues?
 If I were a friend of yours and needed similar services, what would you say about this firm? How likely are you to refer (this firm) to others on a scale of 1 - 7. One being never and seven being always?



THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Client Conversations

- Transcripts
- Testimonials
- Themes
- Initial Taglines



THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC



920 SECOND AVENUE SOUTH
SUITE 1550
MINNEAPOLIS, MINNESOTA 55402

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

TK Advisors Ltd

ABOUT US SERVICES CAREERS REFERENCES CONTACT US

CLEAR THINKING. CREATIVE IDEAS.

If accountants are a different breed, TK Advisors Ltd may be a whole different species.


When you first focused on using your built track or meeting your accountant for years, you must be a client of TK Advisors. They received knowledge with an entrepreneurial mindset. TK Advisors is a place where great personalities meet.

From equipment of the profession and locally feel down staff back to our firm after working in private industry as CFOs and controllers. They apply the real-world business knowledge they've acquired and ask the questions. Many clients have thanked us for providing practical and honest advice about their situation since when it's hard to hear because it made a big difference professionally or personally.


TK Advisors takes the long view. We seek help to create long-term relationships with clients and staff. We were successful in positioning financially sound start-up services for CFOs in the US and we are now applying our talents to financial forecasting, tax planning, and other high-level services.

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC



Old Newsletter



New Newsletter

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC


Differentiation Circle: Community

- Ad messages
- Sponsorships / Pro Bono
- Association memberships
- "Janty" survey

● ● ● ●

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC



JANE LOUIE
JLOUIE@LOUIELAWFIRM.COM
617-281-0239

◆

Louie Family Law is pleased to announce that founder Jane Louie just elected President of the American Academy of Matrimonial Lawyers — Massachusetts chapter. This select group of attorneys is dedicated to improving the practice of matrimonial law. Jane is pleased to spread the excellent efforts of A.A.M.L. — Massachusetts to support the long-term pathing of families in transition.

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Differentiation Circle: Competition

Competitive Analysis

- Web
- Print
- Materials
- Secret Shop
- Focus Groups

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

PBKG's Bios: B-


Good professional information but little personality.
Will I like to work with him?

Only some have photos and they are not consistent.

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC


MMSJ's Bios: A-
Nice overview of entire team;
approachable, friendly photos with
consistent backgrounds



THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

MMSJ's Bio Continued
Very lengthy and could also use a
little more personality



THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

GCB's Services: A
Easy to find navigation on menu bar as
well as Areas of Focus on left column.




THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

PBKG's Navigation: B-

Reorganizing and consolidating menu options would make navigation much easier. Not having content span across most of the screen would also make it feel less cumbersome.



THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Differentiation

The Izzy
Competitive Differentiators
Experience Themes & Messages
Foundation Themes

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Differentiation #1

Foundation Themes
"All of our clients are closely-held businesses, mainly in families."
Explanatory

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Differentiation #2

Experience Theme
“Unstoppable in the face of complex issues.”

Emotional and experiential

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Differentiation #3

“Six of our team members grew up in family-owned businesses and apply those lessons to help our clients.”

“We are the only firm in the area that uses a family dynamic and organizational development expert on our family business team to recognize the family issues are not separate from the business issues.”

Different from the competition

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Differentiation #4




<http://www.izysicecream.com/>


THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Differentiation

Taglines

[Alston & Bird](#): Leadership. Creativity. Results.
[Crowell & Moring](#): Experience. Creativity. Results.
[Strellis & Field](#): Experienced. Driven. Effective.
[Wells Jaworski & Liebman](#): Effective. Efficient. Expeditious.



Free!
Top 50 law firm
taglines.

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Differentiation

Taglines

[Perkins Coie](#)
 Legal Counsel to Great
 Companiessm



Free!
Top 50 law firm
taglines.

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Differentiation

A work in progress, composed of:

- What you say you are or aspire to
- What your community knows about you
- What your clients depend on you for
- What your competition does not own

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Our process

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Integration

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success

INGENUITY
Marketing Group, LLC

Educational Tools

InGenius Review:
our free bimonthly
newsletter about
professional service
marketing.

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success



Educational Tools

Podcasts, videocasts and
information galore at
www.ingenuitymarketing.com

THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success



Thank you

Questions?

Ingenuity Marketing Group LLC
(651) 690-3358
www.ingenuitymarketing.com
wendy@ingenuitymarketing.com
