

MEMBER BENEFIT GUIDE TO AAM'S ONLINE SITES

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INTRODUCTION TO AAM'S ONLINE SITES

Association for Accounting Marketing (AAM) has four online sites containing valuable tools and resources designed to offer information, insight and best practices to drive growth within your accounting firm, including:

AAM Website: Website visible to the public at: www.accountingmarketing.org. This external facing website is accessible to members and non-members alike and is the resource we direct most of our external promotions, including email and social media campaigns. This website provides general information on the Association, as well as a more intimate understanding of the various elements that make up AAM, including our people, our resources and opportunities to connect.

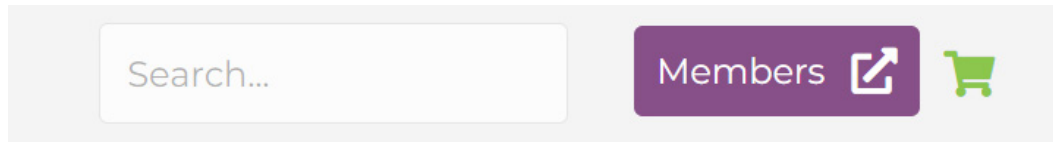
AAM Connect: Members-only site where members can connect with one another in the open forum to ask questions and share information. It is also a resource hub used for internal communications, member listings, participation opportunities and accessing resources exclusive to members.

AAM Store: A portal that is accessible to members and non-members for updating member profiles, registering for events, accessing AAM resources, renewing dues, purchasing job postings and more. Some sections do require a login and are available to members only.

AAM Online Learning Center: The Online Learning Center houses AAM's educational courses, training programs as well as learning and development programs.

ACCESSING AAM'S ONLINE SITES

AAM Website



To access AAM Connect or the AAM Store, visit www.accountingmarketing.org. At the top of the website homepage, you will see a “Members” button where that will link you to AAM’s member-only site AAM Connect and a green shopping cart that will link you to the AAM Store.

- You must be logged in to access the AAM Store and AAM Connect.
- Enter your username and password – your username is your email address.
- If this is your first time logging in, you will need to reset your password.

Check out the YouTube video created by the AAM Website committee on “How to Log Into the AAM Store and AAM Connect” <https://bit.ly/3INSIzk>.

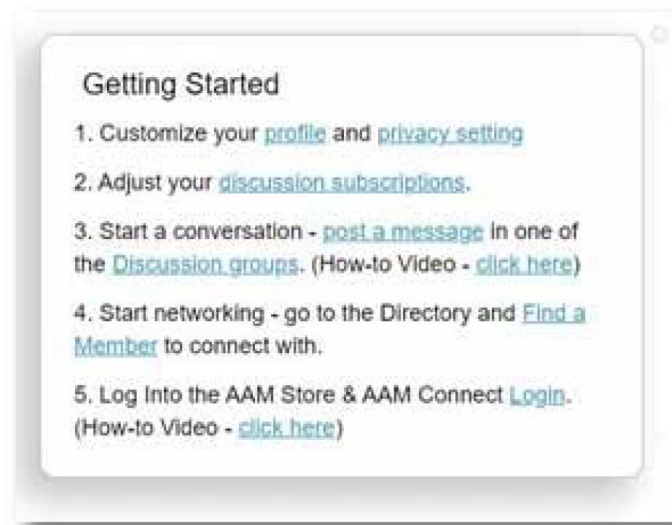


- Once logged in, this will take you to AAM Connect. You can then toggle back and forth between the three sites – Website, Store and Connect – using the links at the top of the page. The text link “Members” is AAM Connect.



AAM Connect Home

Once on the AAM Connect homepage, go to **Getting Started** to customize your profile, adjust your privacy settings and learn how to post a message or use the Directory.



Also located on the homepage:

- **Latest Discussions** – Latest discussion posts on the Open Forum
- **AAM Connect Rules** – AAM Connect Rules and Anti-Discrimination and Harassment Documents
- **Join an AAM Circle**
- **Job Postings**
- **Upcoming Events**
- **Marketer's Library**

Tabs on AAM Connect

Communities

- **Open Forum** – Post questions or information to the membership.
- **All Communities** – Use the drop-down menu to view the communities in which you are a member. Communities are by invitation and members can only see the communities to which they belong.
- **Committees** – Not for member use.



Network

- **Members** – Find fellow members and their contact information.

Events

- **Event List** – Learn about upcoming events.

Resources

- **Social Media Toolkit**  The toolkit is a special benefit for AAM members packed with relevant resources for marketers and their firms and will help to get you off to a successful social media presence. The toolkit includes an introduction and action plan, guides and tutorial videos and additional social media tools.
- **AAM Brand Guide** – The AAM Brand Guide provides guidance for use of AAM logos, colors, typography and other supporting elements including brand voice.
- **AAM High Recordings** – Recordings of our AAM High! virtual education program that includes relevant topics and emerging issues in the accounting marketing industry.
- **AAM Content Hub**  View the various thought leadership resources available to members, including CPA Growth Trends Blog, AAM Minute, Growth Strategies, AAM High! Webinars, AAMplify! Podcasts and Surveys.
- **Using the .CPA Domain** – A chart that outlines how firms might use the .CPA domain.

Request Forms

- **Website Requests** – Request a page or post on the website.
- **Social Media Post Requests** – Request something to be posted on AAM's social media channels.
- **Volunteer Shout Out** – Recognize an outstanding AAM volunteer.
- **Request for AAM Branded Collateral** – Request for AAM branded material, such as logo, letterhead or graphic images.
- **Blog Request Form** – Submit a blog post.

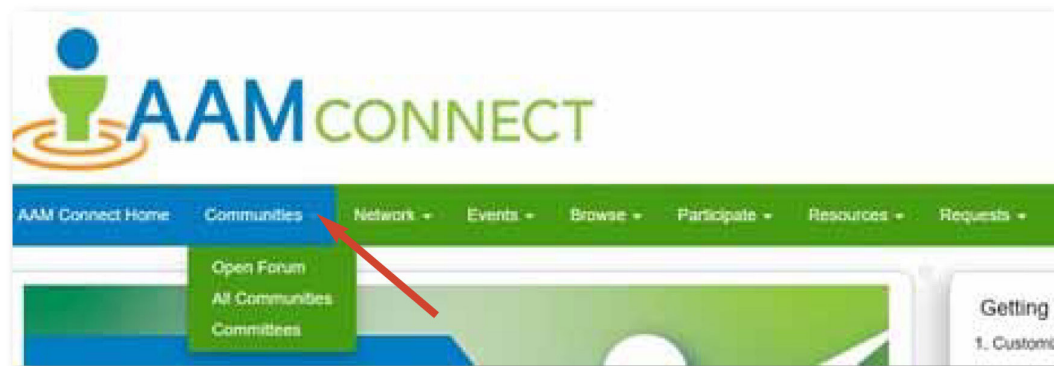


Member sign-in required

STEPS TO POSTING A MESSAGE ON AAM CONNECT

You can also view this YouTube video created by the AAM Website committee on **How to Post on AAM Connect**. <https://bit.ly/3AEjEb5>

1. Once logged into AAM Connect, select Open Forum.



2. To post a message, click on the green “Add” button by the Latest Discussion Posts.

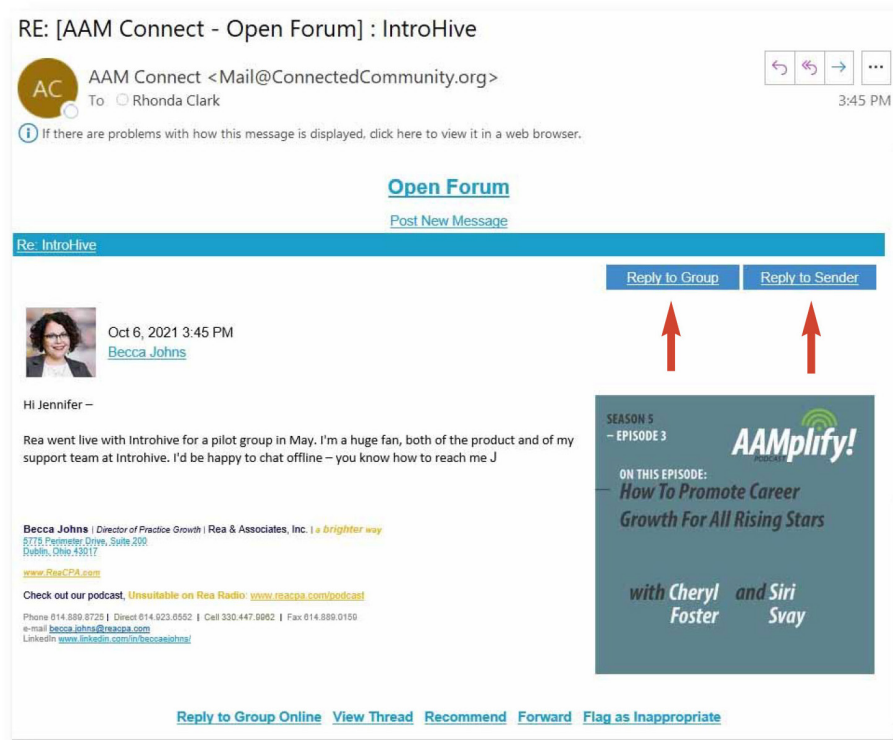


3. This will open a new message thread. From Open Forum, you will note a discussion subject, your message and can add an attachment as needed. Note, any documents you attach to a message will be saved in the Communities Library.

- If you're ready to share now, click "Post."
- If you'd like to schedule your post to be shared as a later date/time, click "Schedule."
- If you'd like to save as a draft to be accessed later, click "Save as Draft."

The screenshot shows the 'Start New Thread' interface. At the top, the title 'Start New Thread' is in green. Below it, the 'Post to community' dropdown is set to 'Open Forum'. The 'Cross post to (optional)' dropdown is set to 'No Additional Threads'. The 'Discussion subject' text input field is highlighted with a red arrow. Below this is a checkbox for 'Post message anonymously' and a 'Yes' button for 'Automatically insert content preview for links'. A rich text editor toolbar is visible, followed by a large text area for the message content. At the bottom, there is a 'Signature' section, an 'Add Attachment' link with a plus icon (highlighted with a red arrow), and four buttons: 'Post' (highlighted with a red arrow), 'Schedule', 'Save as Draft', and 'Cancel'.

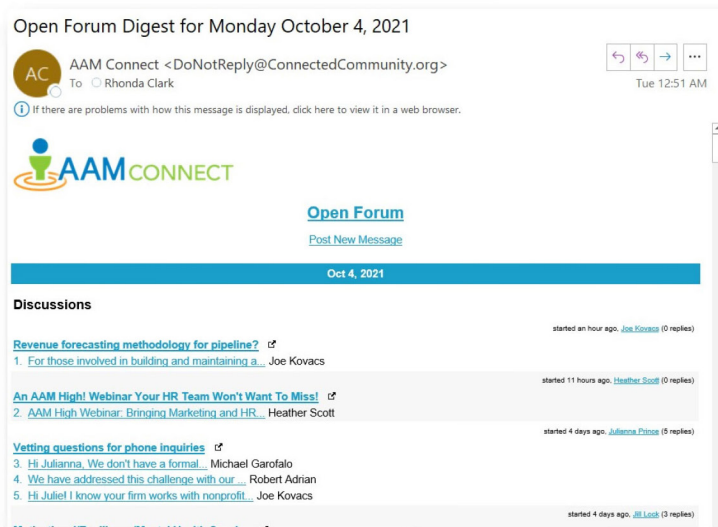
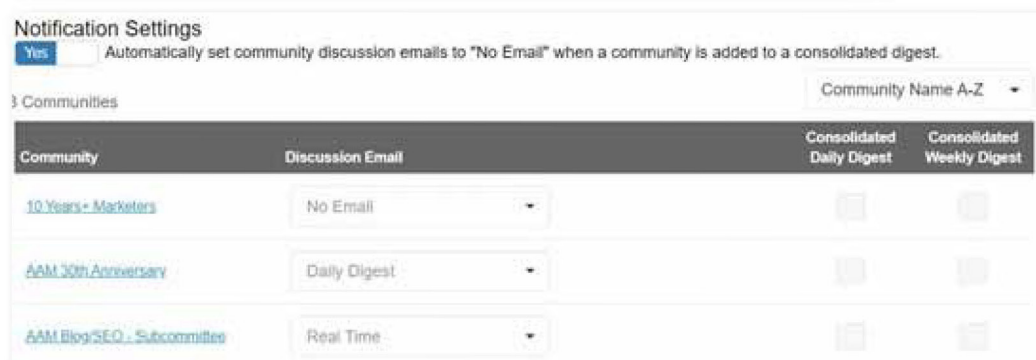
4. Your message will be received by your fellow members as an email in their inbox. If you'd like to save as a draft to be accessed later, click "Save as Draft."



5. You can respond to the email in a couple of ways.
- Clicking Reply to Sender in the blue box will send an email message to the inbox of the person who started the thread.
 - Clicking Reply to Group in the blue box will add the message to the original-thread in the community and send an email message to everyone in the group.
- Note: If you are not logged into the system, it will force you to login.

- 6.** In your profile on AAM Connect, you can set to receive these emails in Real Time, Daily Digest or No Email.
- Real-Time** means you will receive an email each time a message is posted to that discussion forum.
 - Daily Digest** means you will receive one email including all the posts from that day. (If nothing is posted that day, you do not receive an email.)
 - No Email** means you will not receive any emails.
 - Consolidated Daily Digest** - all activity from the previous day for the communities you specify in a single email.
 - Consolidated Weekly Digest** - all activity from the preceding week for the communities you specify in a single email.

To check your settings, go to your profile on AAM Connect and under My Account select **Community Notifications**. Scroll down the page to **Notification Settings** to manage the frequency in which you receive your emails.



Sample Daily Digest Email

AAM STORE

On the homepage of the AAM Store, you will find some valuable tabs and buttons.

AAM Store Tabs



- **Membership** ➡ This page allows you to update your profile and pay invoices.
- **AAM Home Page** – Links to external AAM website.
- **AAM Connect Homepage** – Links to AAM Connect Homepage.
- **About AAM** – Links to the About AAM page on the website, including an overview of AAM, mission statement, vision statement, strategic plan and DEI statement.
- **Why Join?** – Links to the Why Join AAM page on the website. Check out our infographic with stats and facts on AAM, and learn more about membership benefits and opportunities, including Executive, Affiliate, Educator and Organization memberships.
- **Contact Us** – Complete the contact form and someone will reach out to you shortly.

➡ Member sign-in required

AAM Store Buttons

This portal is your one-stop shop for AAM products designed to drive your accounting firm's growth. Here you can update your member profile, register for events, access valuable AAM resources, renew your dues, purchase job postings and more. Please note, some sections require a login and are available to members only. For assistance, contact our staff at (859) 402-9769 or info@accountingmarketing.org.






- **Join AAM** – Links to the Why Join AAM page on the website. Check out our infographic with stats and facts on AAM, and learn more about membership opportunities, including Executive, Affiliate, Educator and Organization memberships.
- **Dues Renewal** – Learn more about the dues renewal process, including a link to renew.
- **Event Registration** ➡ Calendar showing upcoming events, organized by New Member, Virtual Campfires, AAM High Webinars and general events.
- **Swag Store** – **New to AAM**, shop for your favorite AAM merchandise online. Shirts, Coffee Mugs, Water Bottle, Notebooks and more.
- **Resources:** Publications, Surveys, Recordings – Links to items available for purchase, including:
 - ▶ Survey reports \$
 - ▶ Summit recordings and AAM-MAA submissions book \$
 - ▶ Emerge recordings \$
 - ▶ DEI Training Recordings (members only)
 - ▶ AAM State of the Association Town Call Recording (members only)
 - ▶ Marketing and Sales Roles in Accounting
 - ▶ PCPS Social Media Toolkit (members only)
 - ▶ AAM Business Development Roundtable recordings (members only)
 - ▶ CPA Domain recordings (members only)
 - ▶ AICPA recordings (members only)
 - ▶ AAM Replays


➡ Member sign-in required

\$ Discount for members

AAM Store Buttons (cont'd)

- **Online Learning Center**  Members can access the courses they have registered and paid for, including the Business Developer Fundamentals Certificate Course and Summit. Through this page, you can access recordings, handouts and other resources from those courses.
- **Committees** – Links to the Committees page on the website. A breakdown of the AAM committees, including descriptions of the committees, subcommittees and committee leadership. Interested in joining a committee? Want to learn more about AAM's structure for committees and task forces? Email us at info@accountingmarketing.org.
- **Job Postings** – Links to the job posting page on the website. This page provides details on AAM job postings, including posting details and pricing. 
- **Sponsorships** – Links to the partnerships/corporate sponsorship page on the website. From providing support for key strategic initiatives to helping AAM provide cutting-edge thought leadership, these partners make a sustained and important contribution to AAM's success. Partnership opportunities are available at all price points, and interested parties can work directly with Samantha Bowerman. 

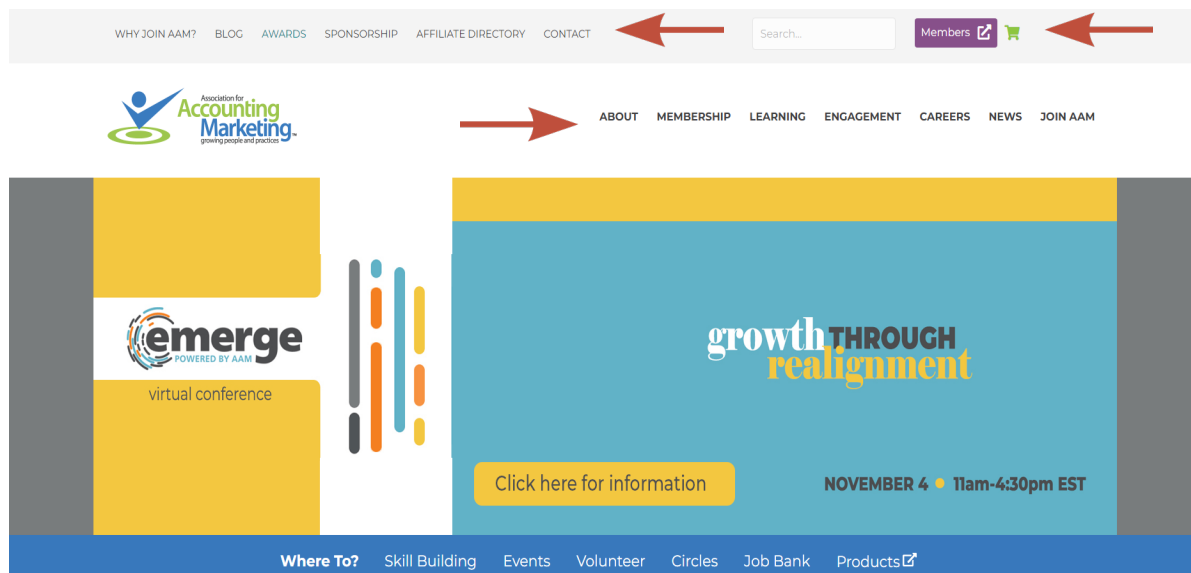
 Member sign-in required

 Discount for members

AAM WEBSITE

In 2022, AAM updated its website - accountingmarketing.org - offering visitors a fresh look, easy navigation and useful information about upcoming events and resources.

The new website provides multiple navigation options to guide you to the content you're looking for as quickly as possible (e.g., a main navigation bar, an auxiliary navigation bar, a "where to?" bar, and more — all before your first scroll down the homepage!). Quickly navigate to our AAM Connect, by selecting the purple Members button. The green shopping cart takes you to the AAM Store.




Call out circles highlight events that are timely and may required needed action by visitors.




As you scroll down the site, viewers are presented with the most updated content such as publications, news, and upcoming events.


Publications & News

**PUBLICATION**

AAM Minute
October 2022: Recruiting
Beginner's Guide: We have all heard about the "Great Resignation" and how the talent pool for the accounting profession is dwindling. If you are new to marketing for accounting, you...
[Click to Read More.](#)

**PRESS RELEASE**


Newsroom
AAM Virtual Conference Addresses M&A Frenzy Impacts
Lexington, KY, October 3, 2022 - The Association for Accounting Marketing (AAM) has announced it will host its third annual virtual conference, Emerge, on November 4, 2022. The theme of...
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**PUBLICATION**


AAM Minute
September 2022: Marketing Strategy for 2023
Beginner's Guide: Does your firm have a marketing strategy in place today, or are you finding yourself starting from ground zero and unsure where to begin? This article will discuss...
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[Browse Publications](#) [Read the Blog](#)


Upcoming Events

**WEBINAR**


AAM High! Webinar: Google Analytics 4 Overview for Accounting Marketers
October 25 @ 1:00 pm - 2:15 pm EDT
[Details & Registration](#)

**emerge**
POWERED BY AAM


Emerge
November 4 @ 11:00 am - 4:30 pm EDT
[Details & Registration](#)

**NEW MEMBER WELCOME**

New Member Welcome Call
November 8 @ 11:30 am - 12:30 pm EST
[Details & Registration](#)

**VIRTUAL CAMPFIRE**

Virtual Campfire: Seat at the Table
November 16 @ 2:00 pm - 2:45 pm EST
[Details & Registration](#)

**WEBINAR**

AAM High Webinar: Discover the Benefits of Live Chat
November 29 @ 1:00 pm - 2:15 pm EST
[Details & Registration](#)

[View Calendar](#)

The home page also links to the latest job postings, highlights our sponsors, and provides quick ways for visitors to sign up for our newsletter and podcasts.

Job Bank

[View All Jobs](#)

Marketing & Business Development Manager
CRBA
Chicago, IL
Posted Oct 20, 2022
[Details](#)

Digital Marketing Coordinator
BMSS Advisors & CPAs
Alabama - Birmingham, Gadsden or Huntsville
Posted Oct 18, 2022
[Details](#)



Senior Proposal Lead
BerryDunn
Bemote, or MA, NH, ME, AZ offices
Posted Oct 14, 2022
[Details](#)

[Post a Job](#)


Our online job bank is consistently ranked as one of the top pages visited every month by many accounting marketing and industry professionals. Taking advantage of this resource to reach AAM members lets you target applicants who already fit the job qualifications you are looking for, ensuring that they will bring value to your firm.

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AAMplify! Podcast

On this episode of AAM's AAMplify! podcast, Chuck Summers, Director of Practice Growth, MCM CPAs & Advisors discusses internal collaboration with Donna Erbs, Chief Marketing Officer, Anders CPAs + Advisors.

[CLICK HERE TO LISTEN](#)

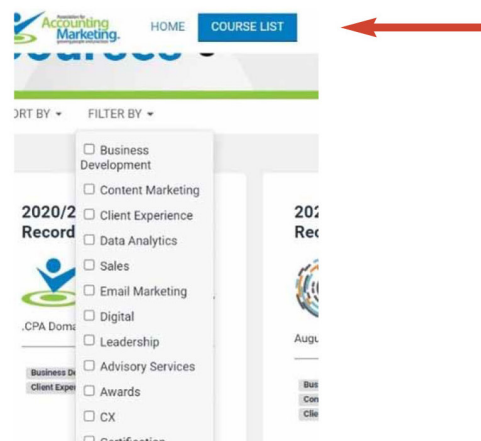


AAM ONLINE LEARNING CENTER

To access the AAM Online Learning Center, login in to the AAM Store. On the homepage of the AAM Store, click on the Online Learning Center button. This will take you to the home page where you can see AAM's latest courses, including recordings of conferences, AAM High! webinars, business development roundtables, DEI training sessions, as well as additional training forums and events. Select "Details" to access videos and content for that course or courses. Each course contains tags indicating what topics are being addressed.



If you are looking for a specific topic, select Course List to filter by keywords.





QUESTIONS?

Contact: info@accountingmarketing.org

