

Growth Strategies

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The Journal of Accounting Marketing and Sales

**New AICPA Chairman's
Vision for the Accounting
Profession and What
It Means to Marketers**

**Demystifying Legal
Services Marketing**

Tips for successful collaboration
with a legal marketer



Association for
**Accounting
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growing people and practices

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From the Editors

Game-changers. "Ah-ha" moments. Epiphanies. Call them what you may, but today's marketing departments are responding to a new way of doing business, and in the process going through a dramatic metamorphosis. From people to budgets, marketing resources are shifting... fast. Firm owners are demanding better ROI due to the prolonged no-growth economy. And electronic marketing is forcing a tough change on how budgets for business development are being divvied up.

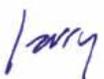
Yesterday's best practices won't work anymore. Branding used to mean placing a few pretty image ads featuring the new logo and snazzy positioning line in the local business journal. Maybe a direct mailer to a few thousand of your closest friends, together with a press release to the local papers. But no more.

Astoundingly, people are beginning to make buying decisions for CPA relationships based solely on their Internet experiences. This reality has led to firms scrapping their printing and print media budgets in exchange for significant Web investments, including video, websites, social media and public relations resources. Not convinced? Consider this: A scant seven or eight years ago, how many professionals do you know were considering a career in social media or search engine optimization?

To survive and thrive in CPA marketing, new strategies are being invented. In this issue, we explore the impact of social media on our firms and how thought leaders are grasping onto these new trends and leveraging them for fun and profit. We will also talk to our friends in legal marketing, and get an expert's insights regarding Web analytics. Plus, we will peek into how the AICPA's leadership views the near future of our industry. We have also snuck in a snapshot from our 2013 AAM Summit Chair on what to expect at this year's conference.

If value in AAM membership is derived from uncovering practical ideas, this issue should prove worth the price of admission. We hope you enjoy the issue, and encourage your thoughts and ideas in response.

Sincerely,



Larry Feld,
Editor



Becky Livingston,
Editor

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The AICPA's 100th Chairman, Richard J. Caturano, CPA, CGMA, identifies the changes and opportunities in the CPA profession and how they align with marketing needs. *Becky Livingston*



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What is it like to walk in the shoes of a legal marketing manager? What differences and similarities help or hinder joint marketing efforts between CPAs and attorneys? This article shares the insights of experienced marketers who know how to get things done. *Jill Kovalich and Holly Fish*

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Larry Feld and Becky Livingston

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Capitalizing on the Fallout from Mega Mergers

One only needs to look at the Mergers and Acquisitions section of *Accounting Today* to see that merger mania among accounting firms shows no sign of slowing down anytime soon. Industry pressure for growth in order to improve competitiveness and market share, promote new partners and motivated professionals, and fund partner retirements will fuel more mergers in 2013.

Mega mergers of accounting firms with at least \$25 million in revenue, the most recent being CohnReznick and Clifton Gunderson-LarsonAllen, are the largest in a series of mergers involving top 50 accounting firms over the past three years.

At a recent AAM chapter meeting, while listening to a conversation of accounting firm marketers focused on the middle-market sector, several marketing professionals said they are capitalizing. Consider these possibilities:

- ✓ According to the National Center for the Middle Market quarterly survey, over the last 12 months through the 3rd quarter 2012, midsize companies increased headcount by 2.2 percent, outpacing what it said was 1.7 percent growth in economy-wide employment. The Bureau of Labor Statistics puts it at 1.4 percent. Revenue grew by 5.5 percent compared to 1.6 percent for large companies in the S&P's 500-stock index. Growth in the middle-market business sector, coupled with continued accounting firm mergers, will bode well for those CPA firms that concentrate on the middle-market sector and remain focused on delivering a high level of service and value.
- ✓ Middle-market firms continue to ramp up their recruiting to those who may be unhappy with the terms of a merger deal. A partner or professional may find themselves working for a much larger firm, whose culture, higher fees, and conflicts of interest put the partner's book of business at risk, driving them to look for another middle-market firm at which to spend the rest of their career.
- ✓ According to the *2010 CCH Accounting Firm Client Survey: Improving Retention through Better Client Connections*, clients want their firms to be closely connected to them, and they want their firms to be available anytime, anywhere in case a problem arises. Firms that are focusing resources on growth through mergers may be taking

those resources away from client focus — and the larger the firm, the harder it is to maintain a high level client service culture. 

Media Strategies for 2013

According to Sally Falkow, president and co-founder of PressFeed, the public's appetite for instant visual news has "turned the news business on its head and changed the way news is gathered, reported and consumed." This demand opens doors for firms to become content resources for earned media, publish their own news, and purchase space for branded content on news and social sites. She offers five tips for tapping into these trends:

Visual storytelling. Studies show that adding visuals to a text story can increase views and engagement by as much as nine times. Brands are learning that it pays to tell, not sell. According to Altimeter Group, marketers plan to add more video to content marketing initiatives, necessitating increased investment in both technology and production resources.

Become a resource for the media. Newsrooms are under pressure and are working with limited resources. Offer experts, research, and visual materials that expand and enhance a story.

Brand journalism. Tell your own stories using blogs, mini-sites, and industry news sites.

Develop a smart distribution plan. Emailing a release to a handful of journalists and placing your news release on the wire is not enough. Build a network of influencers who will give your content legs.

Host and display all news content in a social online newsroom. Operate your corporate newsroom like a publishing exercise. Make it a venue where creative staff, editors and community managers can collaborate, curate and syndicate your news content. Heed the advice of David Armano, managing director of Edelman Digital — if you don't have this model within a year you may regret it. 

New AICPA Chairman's Vision for the Accounting Profession and What It Means to Marketers

Becky Livingston, *Royal Apple Marketing*

In October 2012, the American Institute of Certified Public Accountants (AICPA) announced the appointment of its 100th Chairman, Richard J. Caturano, CPA, CGMA.

This Harley-Davidson riding Massachusetts CPA was a founding partner in a small Boston-based accounting firm and built it into a dominant position in the New England region. Caturano & Company merged with McGladrey LLP in 2010, and Rich Caturano now serves on McGladrey's executive committee.

As part of its November '12 issue, the *Journal of Accountancy* interviewed Caturano, who noted that CPAs are "well-positioned for vital roles of service in the global economy for the foreseeable future."

Identify Challenges. Create Opportunity. Generate Success.

Caturano identified future challenges and opportunities for CPAs and the profession. These include several key issues for the marketing professionals who support the profession:

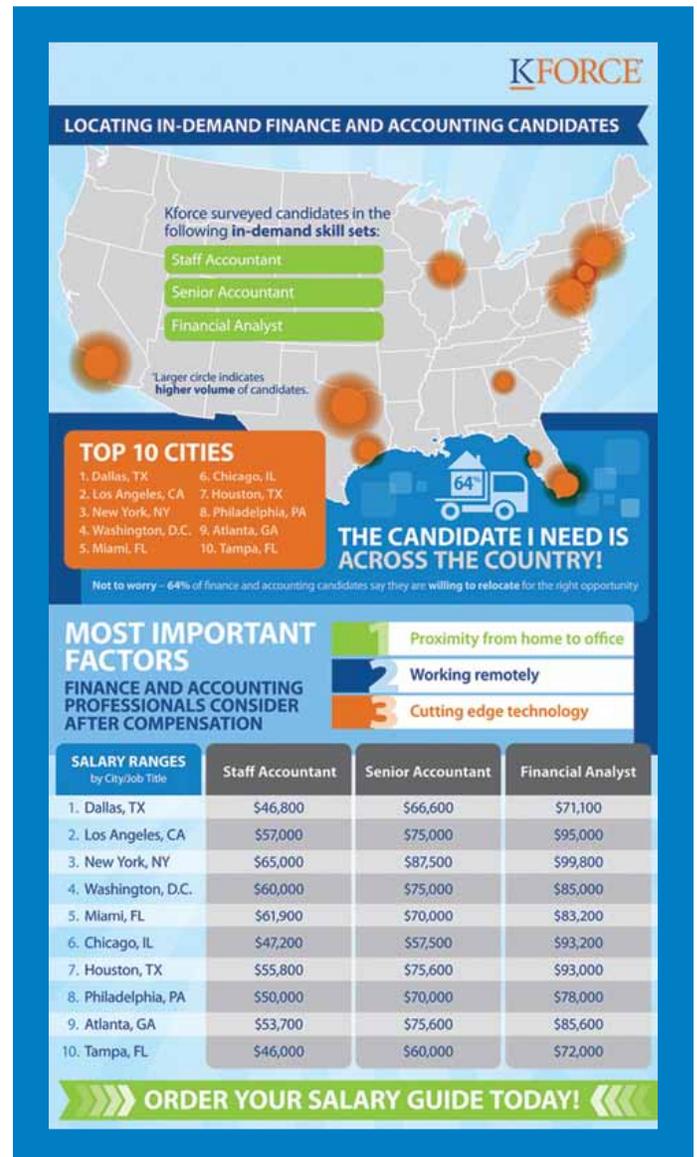
1. Reconsidering firm marketing models
2. Attracting a more diverse group of professionals and ensuring the profession has the best talent as Baby Boomers retire
3. Embracing new technologies to improve efficiencies, services, and younger generations
4. Retaining the best minds to deal with a complex and quick-changing environment

What does this mean for financial services marketers?

Marketers should do for accounting firms what Caturano is doing for the profession — identify challenges, changes, and opportunities. Specifics relating to the four areas that Caturano outlined are discussed below.

The new marketing model

Caturano is envisioning a new marketing model for firms, but given the changes occurring, CPA firms will also need to



revisit the traditional marketing models and consider how to increase ROI. In that light, marketing professionals can take the initiative to understand how dollars spent translate into bottom-line revenue. They should examine the value of various options, such as switching from print magazine/ newsletter/mailer to an online/digital version. Consider, plan, and implement a social media strategy that will bring in more direct traffic to the site.

On another front, firms that are frequent conference exhibitors can consider opportunities such as using sustainable materials that may weigh less and cost less to ship. Use technology to do what print materials may have done in the past. Consider in-house-produced video to replace expensive, outsourced vendors.

Here are some suggestions for marketing professionals to embrace. Leaders should take action to tie marketing department monthly and quarterly expenses to direct results, helping to demonstrate the effectiveness and impact of all campaigns. Include referral traffic metrics to help determine whether marketing efforts are increasing brand awareness,

lead generation, search engine results, and most importantly the bottom line.

Baby Boomers and New Recruits

Caturano believes that, as the Baby Boomer generation retires, “the profession will have to attract large numbers of bright, critical thinkers who have good project management and leadership skills and reflect the racial diversity seen elsewhere in the business world.” That means firms will have to step up their diversity efforts if they hope to benefit from the widest and deepest possible talent pool. Marketing professionals can lend their expertise to this effort by working with the recruiting staff to consider what the ideal client looks like and how well the

Snapshot Sidebar

As financial services marketers, we need to monitor current trends while looking for future trends. AICPA Chairman Richard Caturano has identified four areas that will shape the future of the profession.

Below are a few suggestions based on his vision that you may want to work into your firm’s 2013-2014 marketing strategy. Given their scope, it would be prudent to prioritize them for your firm and tackle them in that order.

1. New Marketing Model:

- ✓ Conduct a gap analysis on your firm’s traditional vs. modern marketing efforts. Create a plan to reduce overlap and fill gaps. Implement. Measure.
- ✓ Give your conference exhibits more bang for the buck. Take things to the next level by revisiting current costs, especially tradeshow costs, and move toward a more modern, technologically enhanced, and less expensive option.
- ✓ Identify and celebrate successes through monthly and quarterly spend reports with a tie to ROI.

2. Baby Boomers and New Recruits:

- ✓ Include/increase diversity in recruiting efforts.
- ✓ Revisit SEO to ensure appropriate terms for targeted audiences are included.
- ✓ Investigate a multilingual website if that makes sense for your target demographic.

3. Technology:

- ✓ Understand cloud-based technology and how as a marketer you may promote your firm’s efforts in this area.
- ✓ Create a mobile-friendly website. If it’s in the works, launch it in 2013.
- ✓ Implement a social media strategy by identifying, educating, encouraging, and promoting its use.
- ✓ Introduce a smart phone app that will make your clients’ life easier.
- ✓ Have a clear and thorough understanding of your firm’s analytics and how they tie to your marketing efforts, including the deeper dive into dark social and direct social referral traffic.

4. Employee Retention:

- ✓ Leverage video to share testimonials about your firm’s culture and to demonstrate “how you’re doing it differently” to attract new and retain existing talent.
- ✓ Share client testimonials on the power of new technology and the ability to reach staff during critical decision-making times. Use those testimonials on the website, as a video montage for conferences, or share on social media.
- ✓ Create and share via social current trends and thought leadership pieces on how the profession is changing.
- ✓ Take a fresh look at your brand image and test how it resonates with mid-career CPAs, those just entering the profession, and those returning after a short absence.

firm's own demographics appeal and relate to that ideal client. Use social media career-focused pages to support this theme, including photos, apps, statistics, testimonials, keywords and more. Then tie that theme to larger marketing initiatives to help create a marketing environment of inclusion and synergy.

When it comes to search engine optimization (SEO), include diversity-focused keywords in all social media, on the website, and in online marketing efforts. Tie those terms into the overall theme.

“The profession will have to attract large numbers of bright, critical thinkers who have good project management and leadership skills...”

Also, determine if having a multi-lingual website is appropriate. Estimate the costs, identify the benefits, and investigate the technology. Then, create an implementation plan. Seek guidance from best practice firms who have successfully implemented a multilingual site to help with the development.

Technology

Many firms and their clients are embracing cloud technology. Marketing professionals can reinforce their roles as strategic partners with their firms by familiarizing themselves with what it means, how it is changing the way CPAs do business, and how it may impact their efforts.

Marketing professionals can also speak up to ensure that their firms are as technology savvy as possible. Is the firm making the best use of social media? Mobile technology? Does it have a client portal? Is there an app that will make clients' lives easier? What differences would these technologies make to the firm's image and ability to serve clients? These are great questions for marketing professionals to raise.

Speaking of social media, marketing professionals should expand the firm's brand presence through company profiles and updates on LinkedIn, Facebook, Twitter, YouTube and Pinterest. Of course, it's best to leverage the platform that most resonates with your clients first, and then branch out to the others.

Last, having a clear and thorough understanding of the analytics gathered each day by your firm's various marketing efforts is crucial. Use the knowledge gathered on future campaigns.

Employee Retention

Firms planning for long-term growth are grappling with employee retention and succession concerns. Caturano envisions "a technology-enabled world with extensive telecommuting where business use of cellphones increases at the expense of desk phones." Be sure to promote your firm's efforts to expand flexibility and work/life integration.

Take a fresh look at your brand image and test how it resonates with younger CPAs. Consider refreshing the look, updating the website content terminology, and leveraging new technology to reach a broader audience. Also think about how people are getting information today via the virtual office, Skype calls, cloud-based services, and more. Is your brand positioned to draw in the talent your firm seeks?

Consider shooting a series of short "day in the life" videos of how your professionals are using technology to complete their work and engage with clients every day, no matter where they may be.

In recruitment efforts and employee newsletters, share testimonials from clients on their ability to reach staff via the many types of technology available within your firm.

Research, write, and share stories about how the profession is changing and how your firm is on the cutting edge of that change via social media, email, online, conferences, etc. Think outside the box and implement strategies that make a difference in the work/life balance of your firm's professionals.

Caturano says that, during the next year, he would like to "give our members a vision of the future." Marketers can provide firms with strategic direction that can help them improve their bottom line, expand their talent pool, boost employee retention efforts, integrate technological advancements, and more. It goes far beyond messaging. Firms need to evolve for tomorrow's professionals in terms of structure, compensation, rewards, flexibility, and advancement opportunities if they are to thrive. 

About the Author

Speaker, author, trainer, and social media advocate, Becky Livingston is a social media and digital marketing consultant to CPA firms. She helps CPA firm partners create strategic marketing plans that include social media elements. She draws real-life examples from her experience at KPMG and CPA2Biz, the marketing arm of the AICPA. For more information, visit the website at www.RoyalAppleMarketing.com or contact Becky directly at Becky@RoyalAppleMarketing.com.



Overcoming Compliance Challenges to Social Media



As human beings, our behavior hasn't changed for centuries. We naturally socialize. Socializing our buying decisions is something that we have done for centuries. Social media simply allows us to connect with those wider social groups — geographically — making our social groups more potent as our social interactions become public through social media.

Joanna Belbey

As social media continues to evolve, so too does its usage and the regulations surrounding those professions adhering to compliance requirements. Starting in 2010, the Financial Industry Regulatory Authority (FINRA) issued regulatory notices to provide guidance regarding the use of social media in the financial services profession, specifically Notice 10-06 and then, in 2011, Notice 11-39.

Why haven't more financial services firms embraced social media as part of their sales and marketing programs?

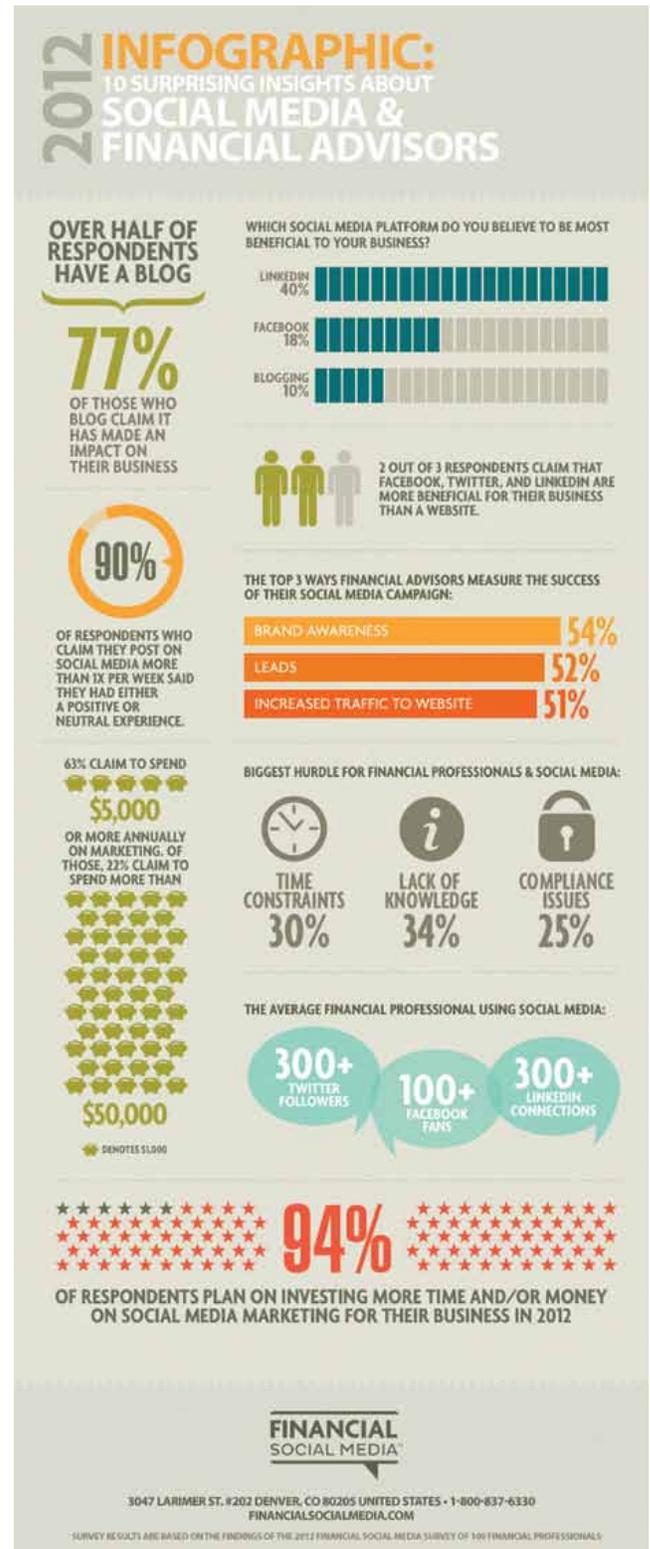
Some of the key reasons are regulatory.

FINRA, the Securities and Exchange Commission (SEC), and several other regulatory bodies outside the U.S. each impose strict guidelines and rules on the use of all electronic communications, including social media. This demands careful oversight of online communications and activities to ensure that financial advisors aren't using social media channels inappropriately or without retaining records of all communications.

A Sampling of Social Media-Related Notices and Rules

FINRA Regulatory Notice 10-06. *Summary:* Static content on social media sites and blogs is considered advertising and need to be pre-approved. However, interactive content, like chat rooms, is considered nonstatic and does not require pre-approval by a registered principal prior to use.

FINRA Regulatory Notice 11-39. *Summary:* To answer some of the questions raised by Notice 10-06, this notice clarifies



The following charts are meant as a primer on Notices 10-06 and 11-39 in relation to social media. They outline the social media platform features, the appropriate course of action, and the kinds of issues FINRA auditors are most interested in.

Key:
A = Advertise PA = Public Appearance ST = Static IN = Interactive PA = Pre-Approve SU = Supervise BL = Block CO = Correspondence

Facebook

Feature	FINRA Definition	FINRA Category	Recommendation	Facebook Control
Basic Information	A	ST	PA	Archive, Post-review, Block/Allow
Profile Picture	A	ST	PA	Archive, Post-review, Block/Allow
Update Status	PA	IN	SU	Archive, Post-review, Moderate*
Upload Photos	PA	IN	SU	Archive, Post-review
Attach a Link	PA	IN	SU	Archive, Post-review
Upload Video	PA	IN	SU	Archive, Post-review
Write a Comment	PA	IN	SU	Archive, Post-review, Moderate*
Chat	—	IN	SU	Archive, Post-review
Compose Message	—	IN	SU	Archive, Post-review
Post New Topic to Group	PA	IN	SU	Archive, Post-review
Create Group	PA	IN	SU	Archive, Post-review
Chat with Group	PA	IN	SU	Archive, Post-review
Post Reply to Group Topic	PA	IN	SU	Archive, Post-review
Join a Group	PA	IN	SU	Archive, Post-review
Like	A/PA	ST/IN	BL/SU	Archive, Post-review, Block/Allow

* moderate means pre-approve

LinkedIn

Feature	FINRA Definition	FINRA Category	Recommendation	LinkedIn Control
Basic Information	A	ST	PA	Archive, Post-review, Block/Allow
Profile Picture	A	ST	PA	Archive, Post-review, Block/Allow
Share Network Update	PA	IN	SU	Archive, Post-review, Moderate*
Comment on Network Update	PA	IN	SU	Archive, Post-review
Compose Message	CO	IN	SU	Archive, Post-review
Write Recommendation	A	ST	BL	Archive, Post-review, Block/Allow
Join Group	PA	IN	SU	N/A
Create Group	PA	IN	SU	N/A
Start Discussion	PA	IN	SU	Archive, Post-review
Like a Group Discussion Comment	A/PA	ST/IN	BL/SU	Archive, Post-review, Block/Allow
Post a Comment to Group Discussion	PA	IN	SU	Archive, Post-review
Ask a Question	PA	IN	SU	Archive, Post-review
Answer a Question	PA	IN	SU	Archive, Post-review

* moderate means pre-approve

Twitter

Feature	FINRA Definition	FINRA Category	Recommendation	Twitter Control
Basic Information	A	ST	PA	Archive, Post-review
Profile Picture	A	ST	PA	Archive, Post-review
Tweet	PA	IN	SU	Archive, Post-review, Moderate*
ReTweet	A/PA	ST/IN	BL/SU	Archive, Post-review, Block/Allow
Reply	PA	IN	SU	Archive, Post-review
Favorite	A/PA	ST/IN	BL/SU	Archive, Post-review, Block/Allow
Follow	N/A	IN	SU	N/A
Send a Message	CO	IN	SU	Archive, Post-review
Create a List	A/PA	ST/IN	BL/SU	Archive, Post-review, Block/Allow

* moderate means pre-approve

that it's the content of the communication rather than the channel that is being reviewed. Firms are also subject to the "adoption" and "entanglement" theories regarding third-party posts, and business communication through personal devices must be supervised and recorded.

National Association of Securities Dealers (NASD)

Rule 3010. *Summary:* Members must establish, maintain, and enforce written procedures for communications of registered representatives.

IRS Circular 230. *Summary:* Tax professionals could be subject to penalties regarding written advice, including their use of social media such as blogs, and Facebook, LinkedIn, and Twitter comments.

New FINRA Rule 2210 (effective February 2013).

Summary: Describes various communications categories (institutional, retail, correspondence) and approval, review, and recordkeeping requirements for each.

SEC Rules 17a-3 and 17a-4. *Summary:* Require written, enforceable retention policies, a searchable index, viewable

and readily retrievable, offsite storage, and storage of data on WORM (write once, read many) optical media.

In addition to making sure they adhere to the rules and regulations, firms are also concerned about the risks of data leakage, malware, and viruses. However, as new technologies have emerged to address regulatory and security challenges, financial services firms are demonstrating to their senior management that the risks of using social media may be mitigated.

What it all boils down to is this: Before engaging in any social media activity for your firm, be aware of the regulations surrounding social media in a professional services firm. Take them into consideration and demonstrate that you have taken a thoughtful approach. Put the review process into place. And, most important, identify an influential principal of the firm who will champion the effort. It's worth it.

As firms slowly adopt social media within their distributed teams as a means to reach out to clients and customers, they are beginning to see increases in new customers and revenues that more than offset their initial concerns about the risks.

To help you sort through some of this, the charts on page 10 and above depict the FINRA definition of the social media activity, the FINRA category it falls within, the action/recommendation, and the social media platform control. 

About the Author

Joanna Belbey is the social media and compliance specialist at Actiance, a global leader in communication, collaboration, and social media governance for the enterprise. Its governance platform is used by millions of professionals across dozens of industries. She helps regulated firms (such as securities and insurance firms) use social media effectively while complying with rules and regulations. Joanna is an enthusiastic user of social media and provides strategic counsel and support on best practices for digital marketing and content strategies. She can be reached at belbey@gmail.com.



Digital Marketer: The Changing Role



Brian Swanson

Accounting marketing has changed significantly over the last 10 years. The focus used to be on what is now known as traditional marketing techniques, such as direct mail marketing, collateral material development, event marketing, networking, and the occasional dose of media exposure.

However, the advent of social media, website marketing, and search engine optimization has significantly changed how firms are marketed today. It's not that goals have changed; generally speaking those have remained the same. It's the techniques that have undergone a radical shift, requiring accounting marketers to be skilled at website management, blog promotion, content development and management, online advertising, and the coveted search engine rankings.

What makes the situation more challenging is that most partners are unable to quantify how digital marketing is helping meet practice growth goals.

“The best thing you can do is be visible, communicate regularly and demonstrate how your management of the process is driving bottom line value to the firm.”

In the rare circumstance where the value of the approach is accepted, the credit for success is often attributed to the website or other digital media tool and not the marketer pulling the strings.



So what's a marketer to do?

How can you get the partners to see the real value that you, as the marketing professional, are bringing to bear through digital media assets? The answer is analytics.

Analytics Is the Key

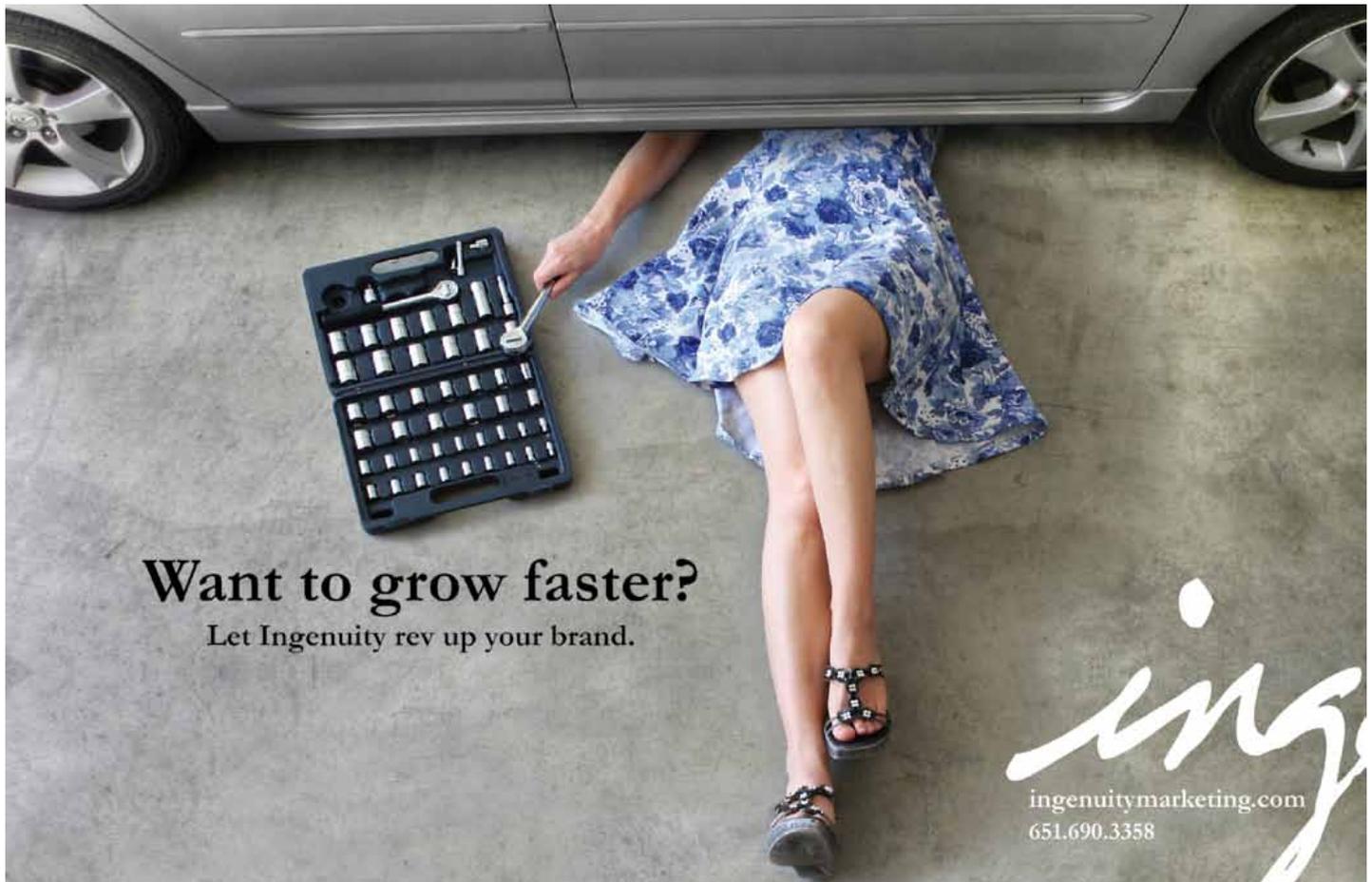
This is the most important component in your digital marketing efforts because it's a tangible measurement of the success of each campaign. Whether you want to assess general website traffic, conversion from an email campaign, or clicks for an online ad, analytics is the key.

It's important to remember that accountants are "numbers people" and in order to communicate success you are going to need to talk in a language they can understand. This means a regular review of key measurements to identify successes, areas of improvement, trends, and opportunities for the future.

Delivering the Message

Once you have a firm understanding of the numbers, you need to present the information in a meaningful way to the partner group. Below are a few suggestions to guide you along, including:

Monthly reports. If you are not already generating a monthly digital media report to the partners, start immediately. Provide



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both global and platform-specific information appropriately. Global items may include variations in total traffic, traffic per campaign, number of conversions (clicks), and resulting number of leads. Platform-specific items may include most popular content, most searched terms, most popular keywords, and number of conversions for the website, blog, etc. Also include commentary about the results each month and, if necessary, provide some discussion about how you will adjust your approach to generate more favorable results in the future.

Develop a leads report. There are often times partners forget where leads come from and don't give it a second thought. For this reason, it's important to document each lead generated through digital marketing efforts. At the same time, work with partners (to the extent possible) as an advocate in moving the opportunity through the sales cycle. This will allow you to garner support from individual partners and solicit their sponsorship for new campaigns or promotions in the future.

New business. The most important metric to any partner is new business. For this reason, it's essential that you identify which leads have closed and for what fee amount. It's incredibly powerful to sit down in a partner meeting and tell them that through our digital marketing efforts the firm has generated \$15,000 in new fees for this year. EVERY partner in the room will understand the significance of that statement.

So regularly check on the status of each lead and be sure to find out the amount of fees brought in.

In Perspective

Each firm is different. The level of reporting detail and sophistication required in a firm with 250+ professionals will be very different from what is needed for a firm with 10 professionals. You need to exercise discretion based on what is practical and the preferences of your partner group. In some cases, the foundation will already exist in which you can integrate analytics into your weekly or monthly marketing report. However, based on our experience it will be necessary to educate your partner group and other stakeholders on the value of each metric and what it means in relation to the overall marketing. Whatever the case, the best thing you can do is be visible, communicate regularly and demonstrate how your management of the process is driving bottom line value to the firm. 

About the Author

Brian Swanson is the partner of search engine optimization at Flashpoint Marketing, a consulting firm for CPAs and accountants seeking accounting lead generation solutions. He is also a member of the Digital Media Marketing Committee for AAM. Brian has also been instrumental in developing several successful mobile marketing programs for top 100 CPA firms across the United States. He can be reached at bswanson@flashpointmarketing.biz.

Demystifying Legal Services Marketing

Tips for successful collaboration with a legal marketer

Jill Kovalich, *Mahoney Sabol & Company, LLC*, and Holly Fish, *EGP, PLLC*

Accounting and legal services marketers share common interests with regard to both prospects and how marketing is considered a strategic business practice within each respective industry. With similar business objectives, it seems like a natural fit for certified public accountants (CPAs) and attorneys to network for the purpose of cultivating referral business.

But, how do we make this happen?

We interviewed tenured marketing professionals with legal industry experience to gain insight as to both the commonalities and differences between CPAs and lawyers that marketers need to know in order to be successful.

Marketing manager Amy Fischer is a former legal marketer who recently joined McGladrey LLP, the fifth-largest U.S. Certified Public Accounting firm. McGladrey LLP is a leading provider of assurance, tax, and consulting services, with nearly 6,500 professionals and associates in more than 70 offices nationwide.

According to Amy, one difference between legal and accounting marketing is the level of regulation with regard to solicitation of new business.



“Lawyers and professionals with legal firms are often hamstrung by the ethics and advertising rules within their industry. This limits their ability to utilize certain marketing tools, such as advertising, direct mail, and sales outreach,” Amy says.

“Accounting professionals have a bit more flexibility in this regard. There is a definite trend toward business development, even hiring outbound lead generation and appointment-setting talent to grow the business,” she notes.

Chief marketing officer Adam Schumann of CPA firm Citrin Cooperman agrees with Amy’s assessment. Throughout his professional career, Adam developed a positive perception about the accounting industry. “I like that accountants are business savvy and seem more progressive when it comes to marketing the firm and its services,” Adam relates.

Having transitioned from legal marketing to the twenty-eighth largest accounting firm in the U.S. with offices in New York, New Jersey, Connecticut, Pennsylvania, and the Cayman Islands, Adam has firsthand experience.

“People skills are most critical in a professional services organization; especially with so many decision makers,” he notes.

He also sees a good fit between legal and accounting marketing and that “most, if not all, skills cross over very well between the two. Both accountants and lawyers focus internally on billable hours,” Adam says, adding that a marketer needs to develop a solid understanding of the firm’s billing structure and profit goals while tying that to the marketing plan.

“To drive that revenue growth, a marketer must be good at business development.” Adam sees this as the area of greatest opportunity for the marketer to drive success, using “a myriad of marketing activities to position the [firm] and key personnel in front of audiences that can give it business.”

Adam explains, “Being a good proposal writer is very important in both industries, but more ingrained in the life of the accounting marketer. Law firms have been slow to merge business development into their strategies, and many don’t have a strong focus on proposal writing.”

Further, he adds, “The slower pace of decision making in a law firm may impact the way an accounting marketer works with

the legal marketer. It may take a little while longer than desired to get a larger or more complex event going, so understanding that and adjusting demands or expectations is paramount.”

“The day-to-day tactical marketing processes seem very similar,” notes Mary Ellen Richards, marketing director at Quattlebaum, Grooms, Tull & Burrow PLLC, an Arkansas-based regional practice with 32 lawyers and 9 paralegals.

“Legal marketers perform many of the same tasks and have very similar responsibilities and focus. Both work closely with the partners and often have reporting responsibility to several and accountability to all,” Mary Ellen says.

After transitioning to marketing after a long career as a paralegal, Mary Ellen feels accounting marketers will find legal marketers share their challenges — internally particularly — with respect to pleasing multiple internal clients. “For legal marketers, it is very important to build relationships with the partners and understand his/her expertise in the respective practice areas. This is rather similar to what the accounting marketer does day in and day out.”

As with accounting firms, the challenge of niche marketing is also important to the law firm marketer. According to Mary Ellen, “Most attorneys have specific practice areas they focus on. As a marketer, to work successfully with attorneys, it’s important to know what kind of work falls within those areas and who is responsible for that specialty.”

Mary Ellen also believes that having a basic understanding of the legal terms and procedures has also been beneficial (e.g., knowing where to find a new complaint or other pleadings; understanding what multidistrict litigation means; etc.) when researching possible new work for the firm.

The Same...But Different

Legal marketers do approach the marketplace differently from accounting marketers, however. While both law practices and CPA firms target vertical industries, accounting firms typically focus specifically on reaching the C-level decision maker, generally in finance (e.g., CFO or CEO). By contrast, legal marketers must speak to a broader and more varied range of prospective client contacts.

In fact, the legal marketer may have several different potential target prospects for their services within the same company. For example, a law practice may target a company’s corporate in-house counsel, while at the same time seek out the executive leadership in order to handle the needs of those high profile individuals (including those seeking estate planning). The firm may simultaneously be targeting the corporate real estate department to assist in lease or purchase negotiations, while also reaching out to the human resource leadership regarding employment law and human resources issues. Of course, they may also be targeting the board of directors to become counsel regarding stockholder and corporate structure issues. As a result,

Want to Network with Law Firms? Develop Mutual Gain Scenarios

As Director of Marketing for a midsize CPA firm, this article’s co-author, Jill Kovalich, has made a number of connections with marketing managers and directors at law firms. She offers the following tips to fellow marketers who are considering reaching out to legal marketers:

1. Take initiative and call and/or email them.
2. Have a well-researched “pitch” ready.
3. Develop a “win-win” scenario for partners on both sides to build enthusiasm for collaboration.
4. Host or orchestrate co-events.
 - ✓ Breakfast “meet and greets”
 - ✓ After-work cocktails and hors d’oeuvres networking events
5. Publish articles co-authored by a CPA and an attorney.

legal messaging can be a complex web of mixed messages to many different targets.

This extremely diversified communications challenge leads to a road full of surprises, even for legal marketers with strong strategic plans in place. As Mary Ellen reveals, legal marketers “never know what the day will hold. We could be helping to secure a new case, sponsoring an event, or preparing a response to an RFP,” she says, adding that the day may also include drafting a press release, completing a law firm survey, or planning lunches for potential and existing clients. “It is not unusual for something unexpected to pop up that needs my immediate attention.”

What’s the best way to develop a working relationship with a law firm marketing director to explore ways to cross-refer business? Our experts suggest that a traditional, well-researched and predictive business development approach is best. All marketers seek new and creative ways to make things happen. So, calling your legal marketing counterpart will be no surprise to them and should be met with a positive response.

Making the Outreach

McGladrey’s Fischer believes it is “perfectly appropriate for an accounting marketer to call a law firm marketer without

a prior introduction or connection.” She advises that it “is important to have information about the firm you are calling, its practice areas and ideas about how your two firms could work together. Do some homework. Read the firm’s website. And, definitely ask your partners to identify lawyers within these firms that they already know who may be able to connect them to others. Work off that list,” Amy concludes.

“The key is to know what kind of law firm you are dealing with,” advises Mary Ellen. “When doing some research, the accounting marketer should first look at the more obvious areas that are natural fits for referrals — estate planning, business formation, mergers and acquisitions, and divorce (if your CPA firm does business valuation and forensic accounting). When reaching out to the legal marketer, know what areas of law practice that firm’s attorneys specialize in and the areas in which they do not practice.”

Litigation firms in particular may be good beginning targets for CPA firms. Since litigators often use CPAs as expert witnesses or consultants on cases, accounting firm marketers should find that litigation firms may be in need of the accounting firm’s services to:

- ✓ Assist with complex financial or accounting issues;
- ✓ Prepare a qualified valuation report to determine the most accurate value of a business or product; or
- ✓ Calculate future costs, expenses, or losses, particularly for divorces where there is a great deal of wealth and complex assets.

Amy notes that, once you’ve made contact with a legal marketer and agreed to proceed with an event, it is important to work closely on the wording, methods, and message in your promotional materials. “Ask what ethics and/or rules that the legal marketer is bound by,” Amy cautions, adding that “the law firm may have some restrictions about how they want to or can be positioned.

“For example, if you were co-hosting a program, a CPA firm might be very willing to promote themselves as the ‘leading, specialist firm in real estate with experts in commercial lending arrangements.’ However, this statement violates a number of ethics rules governing law firm advertising in a number of states. For example, in Connecticut, lawyers cannot promote themselves as ‘experts’ or ‘specialists’; so, be aware that the wording might not work for your legal marketing colleague,” she concludes.

Summary

Our panel of legal marketing professionals portrays a picture of synergy and interchangeability in terms of networking and even co-marketing opportunities between accounting and legal firms. Each relies on partners who are highly educated and experienced. The relationship-based marketing skills required to work within both industries are transferable.

Strategic thinking and business acumen are keys to winning engagements. Adding value to top-line revenue growth is also very important, whether it’s achieved through competitive proposals or business development activities.

Both industries rely upon relationships for building their businesses and share similar corporate titles, daily activities, and the need to build rapport with partners. Finally, while the decision-making pace and flexibility to change may be slower in law firms, both CPAs and lawyers share similar business development and firm succession goals.

CPA marketers should approach their legal marketing counterparts like any other prospect. Research the local marketplace to uncover firms with similar marketing and service approaches. Leverage existing partner relationships and seek guidance from the partners on whom best to approach first. And finally, be proactive and reach out to the legal marketing professionals to seek advice on how best to introduce your firm’s professionals to theirs — and vice versa.

Since there is no cookie-cutter law firm structure, getting to know legal marketers can be very helpful in co-developing successful events and meetings. Make it your mission to track the business generated from those cooperative efforts. Keep the momentum going and be proactive in getting partners to follow up with the attorneys post-meeting or post-event. Share those results with your new legal marketer connection to create that win-win experience. 

About the Authors

Jill Kovalich has more than 25 years of experience in business development, marketing, product marketing, and writing and editing with companies ranging from a Fortune 100 to her own business. Jill currently serves as the director of marketing for Mahoney Sabol & Company, LLC.



Holly Fish is the marketing and client services director of EGP, PLLC. She has been a marketer within the accounting industry for over ten years, six years with EGP, PLLC, which has locations in Arkansas. Holly can be reached at 501-374-2910 or hfish@egpcpas.com.



Making Your Marketing and Business Development Team Strategic, Relevant and Effective

I have always strived to build a marketing team that is strategic, relevant and effective. However, throughout my 25 years of serving in senior marketing and sales strategy positions for regional accounting and law firms, as well as an international Big Four accounting/consulting firm, there have been times when either I or my team members have not been strategic. These instances occurred either because the firm didn't have a current strategic plan in place which forced us to react or because the firm didn't understand how to allow the marketing team to be in a position to lead and drive the firm's marketing and business development operations.

So, what does "strategic" mean?

Let's start with understanding the definition of strategy. One definition from BusinessDictionary.com defines strategy as "a method or plan chosen to bring about a desired future, such as achievement of a goal or solution to a problem." Strategy involves making decisions and staying on a particular course of action. But, with all of the many projects to oversee and stakeholders to satisfy in professional services firms, how does a marketing leader ensure that they and their team stay on strategy? Let's face it: We've all been in this quagmire at some time. How do you avoid that trap?

What the Firm Needs to Have in Place

How does a chief marketing officer (CMO) structure the marketing team, focus their resources, ensure that the firm has a platform to allow the team to be strategic, and have litmus-test procedures in place so that one's team is strategic? Five basic points need to be considered:

1. Stay on plan.
2. Be proactive and have processes in place regarding new client development.
3. Build a team of people trained in strategic planning, and include natural "strategic thinkers."
4. Focus on profitability and productivity.
5. Consistently assess and manage perceptions of you and your team within the firm.

Plan

As the saying goes, "If you don't have a final destination, any road will take you there." One would assume that a firm must have a strategic plan; however, some plans are not followed or are outdated and, in many instances, professionals in the firm tasked with carrying out the plan are not familiar with it. If the firm doesn't have a plan, start rallying to get one in place and oversee its creation. Obviously, collaboration with professionals to create the plan is important; however, they are busy with clients, and they are looking to you to be the subject matter expert on marketing and business development.

Once the plan is in place, get moving, and execute. Always follow up on strategies and tactics to ensure the plan is netting results, and be prepared to refocus if needed; consistently suggest next steps to further guarantee that the plan is completed; and always report on results. In addition, safeguard that everyone in the firm knows and understands the plan by providing education and status updates via partner meetings, retreats, lunch-and-learns and so on. When everyone understands the firm's plan, you and your team have a rationale for rejecting marketing requests that are not consistent with the plan.

Proactive New Client Development Processes

Developing a proactive marketing plan with a focused approach to client development will increase the perception of your team as being relevant and effective.

Some of the tools and tactics that I have found to achieve proactive cross-marketing and new client development include:

- ✓ Developing and coaching current client and prospective (target) teams. The most important aspect of a successful client or target team is the leader — make sure the leader is committed and trained in leading the team.
- ✓ Developing and maintaining a sales funnel for the firm and making it transparent to all stakeholders in the firm. Your internal clients have to know which companies are being pursued and the status of the pursuits. Publicize wins and make certain the entire team involved in the win is recognized.

- ✓ Feeding time-sensitive client and prospect intelligence to the professionals responsible for the relationship. One suggestion is for the marketing department to provide analysis of the firm's opportunities with the prospect. Most firms provide marketing research (financials, bios on the prospective client's executive team, a link to the website, etc.) to the professionals before a pitch. What will make your team stand out and be perceived as strategic and effective is to provide an *analysis* of the marketing research — what are the real issues happening at the company; what competitive, economic and industry issues is the company facing; and, most important, what is your recommendation of the value-added advice and service that your firm can provide?
- ✓ Preparing and coaching a team prior to the client pitch meeting. Several of the firms I've been with required that pitch teams practice for verbal presentations. Whether the firm advocated or not, I've found that one of the most relevant tasks for a marketing team is to work with and guide the team before the big pitch. If you don't have the time or feel that the team needs a different coach than you, hire one for important pitches. There are many advisors who have previously been partners at accounting and law firms who now focus on team and individual coaching. I have found their counsel to be extremely valuable. Stewart Hirsch, a former firm and in-house lawyer who focuses on business development coaching, advises his clients to have strategic conversations *before* the meetings. "Coach professionals to act like a team. Have the lawyers strategize together to prepare for client visits; they do much better when they take the time to talk with each other in advance," Hirsch says. "No one will dominate the conversation. And they will be better prepared to listen to the client before offering solutions."

People

I am blessed with having one of the best teams I've ever had in my career, but that didn't happen by accident. After years of managing marketing teams, I know that not only are technical skills critical, but personalities, motivations and the ability to be a team player at all times are crucial to having an effective team that is functioning at the highest level of productivity, and working toward their natural strengths.

I have a master's degree in counseling psychology and have found that this training has not only provided me with better insight on how to coach professionals in marketing, but has also provided me an enhanced understanding of building and managing effective marketing teams. When I was with the marketing/sales strategy group of a Big Four firm, I was invited to be one of the presenters of a training program focused on the use of Strengths Psychology. The program was premised upon the concepts in the book, *Now, Discover Your Strengths*, authored by Donald Clifton and Marcus Buckingham. The book includes the Clifton StrengthsFinder™ assessment, which reveals one's top talents.

According to the book, the reason working toward one's natural strengths is so important to productivity is that those individuals who are actively engaged are 10 times more productive than those who are less engaged because they are not working to their strengths. According to Clifton, "Successful people understand their talents and strengths and build their lives upon them. Successful companies don't just accommodate differences in employees, they capitalize upon them." You may consider employing the StrengthsFinder™ tool to identify team members with certain strengths, such as a strategic focus, to include on your teams.

Profitability and Productivity

Most CMOs have more on their plate than they can handle and often may not be in a position or have the time to analyze the profitability of engagements or of certain marketing spends. You must have a way to demonstrate return on your marketing investments and be involved in the firm's analysis of profitable engagements and clients. It's not easy to stand up and say that you don't believe that the firm should continue pursuing discounted rates or continue serving clients that are not profitable, but that is your job and you must understand how the firm and its shareholders/partners make money.

“ Successful people understand their talents and strengths and build their lives upon them. Successful companies don't just accommodate differences in employees, they capitalize upon them. ”

Furthermore, you must understand the financials and billing practices of your firm to provide strategic counsel on appropriate pricing for new services or clients. It is also critical to understand how the shareholders and other professionals are compensated. That can be a driving force to motivate them to focus time on a marketing campaign or new prospect. It can also provide a great deal of understanding if someone won't market because they believe it takes away from their required billable hours, or if they believe they won't be rewarded financially for their time and effort.

Perception

So, everything is in place for the marketing department and you to get rave reviews. How do you then assess if all is going along as well as you'd like to think?

"Strategic" means staying on plan. You cannot wait until the end of the year to assess how your internal clients are viewing your progress. Start by establishing strategic goals for yourself and your team each year, and be certain your yearly review assesses the achievement of these specific goals.

Some ideas to obtain ongoing and real-time feedback include sending electronic project evaluations to internal clients following the completion of a project. In addition, get up and walk the halls. Ask the professionals how they view your team's performance.

Sean Smith, Director of Marketing at Schneider Downs & Co., Inc., one of the 60 largest public accounting firms in the United States (with 35 shareholders and more than 265 professionals in Pittsburgh and Columbus), notes that "auditors are trained to look for what's wrong." He takes advantage of this training through the feedback he gets from walking the halls and honestly asking, "How am I doing?" The feedback provides him with information to redirect his efforts. He also meets individually with more than 80 of the firm's professionals per year to discuss their personal marketing plans. These honest conversations, in conjunction with extensive training and proactive internal and external communication strategies, provide Smith with the assurance that he has checkpoints in place to assess if the plan is on point.

Additionally, many firms utilize peer review reports. Find a colleague in a noncompeting professional services firm and ask them to audit your department from a strategic standpoint, and, of course, return the favor. Internally, assign a member of the marketing team to prepare regular reports to all professionals regarding the status of marketing campaigns and new client pursuits. The report should include campaign status, as well as marketing best practice reports leading to wins and citations of winning opportunities and teams.

As part of this ongoing analysis, look at the results that your team can effect. Is the firm growing? Are RFPs increasing? Are the face-time opportunities increasing? Are the professionals picking up more new engagements as a result of taking advantage of the marketing programs in place?

AAM Names New Executive Director



AAM has announced its new executive director, Sara Elier. Sara, who joined the association in March 2010 as the assistant executive director for AAM, brings with her more than 15 years of marketing experience. She replaces Pete Pomilio, who has served as the executive director of AAM since 2009.

"I've had the privilege of being part of the AAM team in the role of assistant executive director for the past three years. During that time, I have been able to work with AAM's passionate volunteer leaders in their quest for growth and new initiatives, including a new relationship in the co-located conference with the American Institute of CPAs, the development of consistent educational programs, and the launch of a new brand and quarterly publication, to name a few," commented Sara.

In her new role, Sara will work with the AAM Board to oversee all business aspects of the association. This includes strategic planning, assisting with decision making, financial planning and forecasting, project management, marketing, sponsorship relations, committee support and management of daily operations.

"I'm looking forward to partnering with the Board on a strategic level to assist AAM in achieving new goals. In addition, I'm looking forward to sharing the Board's strategic focus, as I continue my connection to the committees and members," she adds.

Sara earned a Bachelor of Arts in Communications from Chatham University in 1996.

Finally, make sure you are truly being heard and that you "have a seat at the executive table." Bob Denney, CEO of management and marketing consulting firm Robert Denney & Associates, notes that those CMOs who don't feel they are positioned appropriately at their firm should prepare a well-crafted senior management memorandum regarding the strategic initiatives to be considered. Denney notes, "If there is still no movement by management, you'll have some tough choices to make, including moving on."

In short, taking time out of your busy schedule to focus on strategy is not an option — it's part of the job description of a lead marketing professional. Put it on your calendar now as a standing appointment each week and see your team increase its value to the firm as they become more strategic and relevant. 

About the Author

Cynthia Tonet-Stewart has served in professional services marketing and business development leadership positions for more than 25 years. For the past six years, she has been the CMO for Thorp Reed & Armstrong, a Pittsburgh-based regional law firm with five offices. She spent nine years with PricewaterhouseCoopers (pwc) in senior marketing and sales strategy positions, and she has previously been the marketing director with two regional accounting firms, based in Chicago and Pittsburgh.

Insights from Self-Branded Social Media Stars

Five years ago few CPA marketers envisioned building an entire branding strategy on one person in a firm. Social media and content marketing has changed all that.

Exciting lessons are unfolding in recent successes of our industry's "self-branded" social networking stars. Interestingly, you need not be the firm leader — or even a CPA — to be the firm's thought leader.

The St. Louis-based firm of Brown Smith Wallace, LLC, developed Kyle's Video Blog, a campy, fun romp around the tax code with unlikely CPA host Kyle, the deadpan and sometimes seemingly brain-dead young twenty-something who is, in reality, an actual (and intelligent) staff professional with the firm. Kyle's Video Blog is an idea sparked by the firm's Marketing Director, Michael Bowlan, who discovered the real-life accountant, Kyle Dodwell, after he submitted a video sample for a contest the firm was running to promote the firm's recruiting efforts. While a more traditional video concept was chosen for the recruiting campaign, Kyle's talent was on Mike's radar. Soon after, Mike pitched the Kyle's Video Blog concept to his managing partner after witnessing Kyle's

comedic video talents at the firm's holiday party. "He had us rolling on the floor," Mike recalls.

“Because relationships are built between people and not companies, if you are not going to open up in real life, you are probably not going to be successful online.”

Premiering in February 2012, BSW's meager investment of under \$5,000 — mostly for promotional costs during the year — quickly returned on its ROI goals. The first episode of Kyle's Video Blog was immediately picked up by CPA Trendlines, who featured the vlog on their homepage for two weeks. This early success set the stage. Mike Bowlan's master plan of creating a vehicle to drive SEO, create high value content for cross platform promotions and achieve breakthrough public relations awareness for the firm was realized within months. Overall, the firm's year-over-year Web traffic increased 30 percent, repeat visits jumped over 70 percent and, best of all, the Kyle vlog series created over 5,000 backlinks to their website. "We have differentiated ourselves, raised awareness of the firm and shown our people the power of video and social media," Mike notes.

Another thought leader in CPA industry social media is Jessica Levin, CMP, who is President and Chief Connector of Seven Degrees Communications LLC. As her Twitter descriptor suggests, she is a marketer, event re-imaginer, connector of people,



Kyle's Video Blog employs a mix of youth and campy humor to inform and entertain.

speaker, entrepreneur & lover of kitchen gadgets & cake. She credits her success to early career advice.

“My early bosses, in particular Sally Glick, taught me about the importance of helping others and paying it forward,” Jessica states, adding that “social sites like Twitter and Facebook were natural places to expand my existing networking and sharing activities.” Her early adoption of online communities like Twitter, Facebook and LinkedIn quickly thrust the young event planner and marketer into the spotlight — and a new career. “Social networking has brought me new friendships both professional and personal, created an outlet for seeking and offering advice and established me as a national expert in a growing industry,” notes Jessica, who at this writing has over 1,500 LinkedIn connections and an astounding 9,800 followers on Twitter.

In fact, finding herself needed more and more as a speaker and consultant on social media, Jessica eventually left her job to form her own firm.

For firms just beginning a social media effort, Jessica stresses the importance of selecting a firm member who is comfortable having their social, business and personal lives become a bit seamless. “Twitter is integrated into my life, and it is both professional and personal. Because relationships are built between people and not companies, if you are not going to open up in real life, you are probably not going to be successful online,” she says. For this reason, Jessica believes it is nearly impossible for an outside vendor to build and maintain an effective social media campaign for a CPA firm.

For the Maryland firm Naden Lean, Marketing Director Andrew Rose’s self-branding efforts paved the way for the firm to leverage the talents of a strong business development person and weave those communications into a brilliant SEO strategy.

Using an aggressive, integrated marketing approach, Andrew has helped his firm leapfrog the competition in their dental practice niche by actually creating their own professional association — and utilize use content marketing together with shrewd networking tactics to build an ironclad marketing advantage.

According to Andrew, building the dental association allowed him to test certain online business development theories and put them to work.

“We started with a website, but now have members displaying the association logo at their local trade shows and writing papers on behalf of the association. Today, they are the thought leaders that drive new membership. It is very exciting,” says Mr. Rose, who expects the association to roll out membership nationwide during 2013.

Andrew, who has over 2,500 followers on Twitter, mixes his persona with the firm’s name to become the “face” of Naden Lean.

People You May Want to Connect With

[Twitter.com/Jessicalevin](https://twitter.com/Jessicalevin)

[LinkedIn.com/in/jessicalevin](https://www.linkedin.com/in/jessicalevin)

[Facebook.com/sevendegreescommunications](https://www.facebook.com/sevendegreescommunications)

www.sevendegreescommunications.com

[@dentalcpas](https://twitter.com/dentalcpas)

[@nadenlean](https://twitter.com/nadenlean)

[@sportstaxman](https://twitter.com/sportstaxman)

[@gailrosencpa](https://twitter.com/gailrosencpa)

[@njscpa](https://twitter.com/njscpa)

[Facebook.com/DentalCPAs](https://www.facebook.com/DentalCPAs)

[Facebook.com/NadenLean](https://www.facebook.com/NadenLean)

[LinkedIn.com/in/shesapeakesun](https://www.linkedin.com/in/shesapeakesun)

[LinkedIn.com/in/carolfrontera](https://www.linkedin.com/in/carolfrontera)

Twitter – [@bswllc](https://twitter.com/bswllc)

[facebook.com/brownsmithwallace](https://www.facebook.com/brownsmithwallace)

[linkedin.com/company/brown-smith-wallace](https://www.linkedin.com/company/brown-smith-wallace)

(“The Summa” Blog) profalbrecht.wordpress.com/

Why self-branding?

“You need to think about who you are representing. My firm’s Yelp page has my photo, because when people think of the firm, they think of me. When you have an avatar, a person is always a stronger image than a logo. People are the differentiator,” says Andrew, adding that, after ten years at Naden Lean, management is comfortable having him fronting the firm.

In terms of ROI, Andrew suggests looking at social media as a marathon and not a sprint.

“You can’t expect an accountant to have thousands of followers overnight,” Mr. Rose says. “However, I am a contrarian. Rather than build a community, I want to dominate my search engine results, particularly on Google, and integrate that into my other activities to drive traffic and revenue. That includes going to conferences and trade shows, networking events and other activities that work together as part of an integrated strategy.”

Andrew did share one particularly important best practice for novice social media players: Don’t drink and tweet.



A Preview of the 2013 AAM Summit

Growth Strategies recently had a conversation with Laura Snyder, 2013 AAM Summit Committee Chair, to get a preview of what to look forward to at this year's event.

Q: What is the theme for this year's Summit?

The program this year is entitled, "Win Your Race: Inspire Innovation. Realize Results."

Q: That's a long title. What's the thinking behind that concept?

The theme is action-oriented and concrete. We surveyed last year's Summit attendees and general membership to understand how to improve our Summit. Since 2012 was our first year collaborating with the AICPA Practitioners Symposium and TECH + Conference, we wanted to know what worked and what could be improved. Members overwhelmingly approved our affiliation with the AICPA and the added strength in numbers it affords. The program changes for 2013 reflect the results of our research.

Q: Who should attend the Summit?

We have something for everyone this year. Our educational sessions are offered for all attendee experience levels, and fit into one of three session categories — Marcom/Digital Media, Business Development, or Practice/Personal Development. Presenters were chosen specifically for their commitment to creating interactive learning environments and their willingness to share practical tools and takeaways with participants.

Summit sessions for rookie marketers offer "best practice" ideas on every aspect of their job, and are designed with tangible takeaways. Plus, there is the added bonus of building a nationwide circle of professional resources that may last a lifetime.

Much attention has been given to deliver real value to every attendee, but particularly seasoned marketers. We've uncovered fresh ideas and intelligent, interactive sessions from peers and top thought leaders, including optional pre-Summit sessions for experienced marketers. Everyone should walk away with practical tools, contacts, and inspiration to achieve better ROI for their respective marketing efforts.

Q: Are there any "outside" activities?

Yes! Attendees have told us that networking is important to their Summit experience. For 2013, we have packed the Summit with even more networking opportunities than ever.

For pre-Summit Sunday we have organized an optional tour to the Hoover Dam, followed by a choice of two, optional, pre-Summit sessions for new or experienced marketers.

The *First Timer's* reception will be followed by unique, optional networking dinners. We will be organizing small group dinners at a variety of restaurants outside the session venue for marketers to get to know one another.

We also have optional evening functions planned, such as wine-and-cheese pairing demonstrations with the Bellagio's world-class sommeliers, and gaming lessons hosted during cocktails and appetizers.

Q: Any other surprises?

So many excellent experiences have been planned. We know that, while some members are fans of Las Vegas, not everyone shares this enthusiasm. To this group, we feel our new hotel site will offer many amenities, including top restaurants, shopping, and the world-famous Bellagio fountains. Plus, the convention floor plan is slightly more "foot friendly" than last year's venue, with all educational sessions and Summit events on a single floor.

Our keynote speaker, Tommy Spaulding, radio host and author of *It's Not Just Who You Know*, promises to be "life changing," according to team members who have witnessed him speak. In addition, we are transforming the AAM-MAA Awards ceremony. It is completely revamped into a more dynamic, fun, and energized event filled with... well, lots of networking! No long speeches, no sit-down dinner, and no long delays. Plus, this year, members will have a say in a special "Members' Choice Award"!

Finally, we know there will be many members excited about the post-event tour we have planned to the headquarters of online retailer Zappos. As I mentioned, I believe that every attendee will leave the Summit armed with something of value to bring back to their respective firms, and maybe some new shoes, too.



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