Consistent with its long history, AAM continued to serve as a knowledge hub for its members in 2020. As the pandemic flared, members and leaders actively shared resources with each other to help marketers embrace marketing opportunities like PPP/CARES consulting with both clients and non-clients. Many marketing professionals also found themselves playing a key role in maintaining their firm’s culture and making their newly transformed remote workforce feel connected with each other and the firm. AAM members were quick to share culture-building activities, processes and tools with their peers in support of this new role.

—Carrie Steffen, President, The Whetstone Group
It never ceases to amaze me how open and collaborative our members are. I always learn so much through AAM – both through formalized content and education, and informally through networking with other members.

~ Becca Johns, Rea & Associates, AAM President

AAM and my fellow members were the first place I turned when the pandemic hit and we all shifted to a work from home environment. We shared resources, ideas and support, as all of us were dealing with the sometimes hour-by-hour changing nature of the communications needed for the CARES Act, PPP and other COVID-19 related information.

~ Jen Lemanski, PKF Texas, Past AAM President

VISION 2025

AAM’s strategic plan, Vision 2025, continues to provide clarity and commitment to our members and their firms’ growth and sustainability. By providing industry-leading networking, educational resources and thought leadership to fulfill our mission, AAM delivers a unique value and collaboration not found elsewhere.

With Vision 2025, we’ve actively and intentionally broadened our position beyond exclusively serving accounting marketers. This vision establishes our role as an association for all accounting industry professionals responsible for impacting their firm’s growth and sustainability, including business development professionals and CPA practitioners.
Dear Members,

2020 sure had its share of challenges that changed how we live and work. Thinking back to last spring, I can’t help but remember the uncertainty that was suddenly such a regular part of life. No one knew how long the COVID-19 pandemic would be around or how it would affect our way of life. But there was also a spirit of community, of togetherness. It was reassuring, in a way, to know that we were all in it together.

As marketers and business developers, our firms turned to us to adjust our future growth strategies, to help educate our clients and to keep internal employees engaged. And while our firms were turning to us, we turned to each other.

The AAM community has always been open and collaborative, and 2020 was certainly no exception. The pages of this report show the results of all of our hard-working volunteers and brainpower of our members. Here are some highlights:

- AAM’s COVID-19 roundtables gave members an opportunity to learn from each other and engage in peer-to-peer dialogue on how they were dealing with the evolving crisis. (And, of course, there was no shortage of conversations and collaboration on AAM Connect, too.)
- With the unfortunate but necessary cancellation of our 2020 Summit in Philadelphia, AAM held its first-ever virtual conference, Emerge, which we plan to make an annual event.
- In response to the racial injustice that erupted across the country over the summer, AAM developed a diversity statement, but we didn’t want to stop there. We wanted to put action behind our words to show how AAM – and our members and affiliates – can and will incorporate diversity, equity and inclusion (DEI) into our strategy, internally and externally, and how that can serve as a guide for our members and their firms/organizations. We created a DEI taskforce, which later evolved into a standing committee, that is excited to bring you future programming to take back to your own firms.
- We completed our bi-annual member satisfaction survey, which is an important step in gathering member feedback and learning how we can serve you better. We were excited to see that our net promoter score (NPS) increased by almost 17 points since our last survey and are committed to using that feedback to make AAM an even stronger, more member-focused organization.

So how do we possibly follow a year like 2020? As we look to 2021, AAM is excited to launch our new strategic plan, Vision 2025, which will carry us through the next five years. We’re bringing you Circles, which are small communities of like-minded members to help foster networking and peer-to-peer collaborating. We’re making some enhancements to our website, including a new Affiliate Member Directory and refreshed Marketers’ Library. We launched our first-ever Business Development Certificate Course. And we’ll be developing a strategic technology plan that transforms the organization and uses technology to drive us forward.

AAM wouldn’t be the organization it is today without our tremendous volunteers and members. Thank you, one and all, for making this organization what it is.

Becca Johns
AAM Membership Continued to Grow

149
New Members
in the past year

Total Members 808

Not only can you find AAM members in all 50 states, our members also reside in England, Australia, Canada and Switzerland.
AAM is financially stable and maintains at least 6-12 months’ worth of operating expenses in reserves. AAM engages with an external CPA firm annually to conduct a financial review with a formal audit performed as needed. The financial review of the 2020 financials received a clean report with no exceptions. The last audit conducted in 2019, also resulted in a clean report with no exceptions.
As 2020 turned into one of the most uncertain years we’ve seen, AAM supported accounting marketers by helping everyone stay connected, continuing to build a strong community of creativity and by developing a virtual conference everyone could benefit from. When the world’s doors had to close for a multitude of reasons, AAM’s were wide open.

~ Casey Blake, Director of Marketing, Kolibri Law Support Solutions

AAM demonstrated agility in 2020 in a multitude of ways: from the roundtable discussions that were quickly put together but added tremendous value to marketers and their firms to the pivot from an in-person conference to the introduction of AAM’s new virtual Emerge program that was timely and interactive, to the generosity of members to share their experiences and newly developed tools with one another. Having easy access in a variety of formats and media to our industry’s most creative and forward-thinking minds is always a member benefit, but the value was enormously amplified in 2020.

~ Courtney Kiss, Chief Growth & Development Officer, Johnson Lambert LLP
Our members are some of the best professionals in the accounting marketing industry, so when they volunteer, we want to make sure we get the most out of their time. We recruit committee volunteers who are eager to share their experiences and expertise, connect with fellow members and collaborate on programs and initiatives aimed at advancing the profession. We survey our volunteers, inviting them to share their knowledge and skills, and provide them with the current committee opportunities so they can reflect on where they can make the greatest contribution to AAM. This process helps us identify the best talent to keep our committees stocked and our efforts moving forward.

Nothing we do would be possible without our volunteers. They donate their time, their knowledge, their enthusiasm and their energy towards advancing the goals of AAM, not to mention the accounting marketing profession.

### by the numbers

**Putting Our Aces In Their Places**

Our members are some of the best professionals in the accounting marketing industry, so when they volunteer, we want to make sure we get the most out of their time. We recruit committee volunteers who are eager to share their experiences and expertise, connect with fellow members and collaborate on programs and initiatives aimed at advancing the profession. We survey our volunteers, inviting them to share their knowledge and skills, and provide them with the current committee opportunities so they can reflect on where they can make the greatest contribution to AAM. This process helps us identify the best talent to keep our committees stocked and our efforts moving forward.

Nothing we do would be possible without our volunteers. They donate their time, their knowledge, their enthusiasm and their energy towards advancing the goals of AAM, not to mention the accounting marketing profession.

- **13 members**
  - Chairs: Emily Taibl, Irma Zalivar
  - AAM Minute

- **6 members**
  - Chair: Scott Moore
  - Business Development

- **6 members**
  - Chair: Kristen Lewis
  - Content Task Force

- **8 members**
  - Chairs: Cheryl Foster and Bonnie Buol Rusczcyk
  - DEI Task Force

- **9 members**
  - Chair: Nicola Fleming
  - Emerge

- **14 members**
  - Chair: Jen Lemanski
  - Environmental Scanning

- **5 members**
  - Chair: Carrie Steffen
  - Finance

- **16 members**
  - Chairs: Dana Batorrf, Heather Kunz
  - Growth Strategies

- **14 members**
  - Chairs: Rebecca Weiand, Stephanie Koutsares
  - Member Growth

- **9 members**
  - Chair: Chuck Summers
  - AAMplify! Podcast

- **11 members**
  - Chairs: Brian Falony, Sarah Coulson
  - Social Media

- **10 members**
  - Chairs: Laura Metz, Brunella Reid
  - Strategic Communications

- **21 members**
  - Chairs: Nicola Fleming
  - Summit

- **9 members**
  - Chairs: Dawn Wagenaar, Sarah Gray
  - Virtual Education

- **17 members**
  - Chairs: Scott Dine, Chris Borkes
  - Website

*Committee statistics do not include board liaisons*
AAM Minute Committee
“Our biggest accomplishment in 2020 was incorporating video into the Minute. We successfully did so in the last few issues of 2020 and are carrying that momentum into 2021. We didn’t skip a beat last year, publishing an issue each month, and were able to do a special edition focusing on strategy and communication during the pandemic.”
~ Emily Taibl and Irma Zaldivar, Chairs

Business Development Committee
“We held a number of roundtable calls last year that focused on topics that resonated with BD professionals in light of their current challenges. We also organized the BD Fundamentals Certificate program, which has recently launched. It is all virtual, and its format replaced the original in-person workshop format held in 2017.”
~ Scott Moore, Chair

Diversity, Inclusion and Equity Committee
“Diversity, equity and inclusion is more than a hot topic, but an important and lasting effort that can fundamentally change the culture of firms in a positive way. Cheryl and I were happy to take the lead on this initiative. With the help of a dedicated and passionate task force, we wrote a diversity and inclusion statement for AAM, surveyed our members about where they are and what they need in terms of help, and created an aggressive list of deliverables for the newly formed committee to execute and deliver to members.”
~ Cheryl Foster and Bonnie Buol Ruszczyk, Chairs

Emerge and Summit Committee
“When the AAM Annual Summit had to be cancelled due to the pandemic, AAM leadership sprang into action to ensure educational programing was still made available to members. The Emerge committee was created and built a new educational offering from the ground up. Working within an aggressive timeline, the committee sought out new speakers who could address challenges in the current climate. Emerge also featured custom branding and a custom-built platform to broadcast the content. These efforts resulted in strong registration and an engaging virtual conference with positive feedback from attendees. Emerge was a huge success!”
~ Nicola Fleming, Chair

Environmental Scanning Committee
“The Environmental Scanning Council has met twice since the pandemic forced the world to rethink how they do business. Both meetings covered shifts in the industry and how firms can stay ahead of the curve. There are opportunities to take advantage of right now from a firm culture and client experience standpoint that will serve firms well moving forward.”
~ Jen Lemanski, Chair

Finance Committee
“Our greatest accomplishment was growing our reserves in the midst of economic uncertainty. The finance committee regularly reviewed AAM’s investment accounts and with the help of our investment advisor, shifted assets as needed to mitigate risk while maximizing performance and staying within the parameters of the allocation guidelines stipulated in AAM’s investment policy. We’ve again this year maintained a clean financial record as indicated by our 2020 review of the 2019 financial statements. As an association, we also generated positive revenue in 2020 — despite the cancellation of our annual Summit — which also contributed to the growth of our reserves.”
~ Carrie Steffen, Chair

Growth Strategies Committee
“With the Spring 2020 issue, Growth Strategies was transitioned to digital-only publication in response to the COVID-19 crisis. This enabled us to track analytics and add value to attract potential advertisers. Since Spring 2020, we have increased impressions by 61%, reads by 64% and average read time by 20%. We published the Diversity, Equity & Inclusion issue in Spring 2020, exploring issues and challenges with which that the accounting profession continues to grapple. The Growth Strategies DEI content helped set the stage for deeper discussions about DEI later in the year after the George Floyd murder.

We improved our coordination with the Social Media and Blog committees to amplify the Growth Strategies content, and finally we removed Growth Strategies from behind the paywall on the AAM website, making its content available to anyone who visits the site and more readily shareable on social media.”
~ Dana Bottruff and Heather Kunz, Chairs
committee updates

Member Growth Committee
“As a committee, we were able to launch a revised onboarding process for new members to make them feel welcomed to AAM. This onboarding process includes various touchpoints to the member throughout the year, which includes phone calls and emails from Member Growth Committee Members, touch base surveys and tools/emails to help them get started with their membership. We also continued with our trial membership campaign and saw more members join in 2020 than in years past. Finally, we did more outreach in Canada to bring on new members and grow our presence there.”
~ Rebecca Weiand and Stephanie Koutsares, Chairs

AAMplify! Podcast Committee
“2020 was a quiet year for the podcast committee. There were several brainstorming sessions about how to improve the content and reach of the podcast, with four episodes recorded in the second half of 2020 and are currently in post-production.”
- Chuck Summers, Chair

Social Media Committee
“During 2020, we were able to pivot on promoting Summit initially as an in-person event to a virtual event. We were able to increase our followers and engagement. We saw very high levels of engagement with posts featuring members.”
~ Brian Falony and Sarah Coulson, Chairs

Strategic Communications Committee
“We finalized our Marketing Plan in January, incorporating Marketing Personas and other information on AAM goals, campaigns and competitor analysis. The Plan was shared with the Board in February and presented as an AAM High! Webinar in December with hopes to implement in 2021.

We also developed Strategic Talking Points to identify key areas of conversation that can be touched on when speaking with non-AAM members. These talking points are segmented by target audience and provide insights into programs, resources and stats that speak to specific individuals.

Finally, we revamped our media relations efforts, including the creation of the Media Relations Task Force, updating our media contacts and reviewing previously issued press releases to develop a better, more targeted approach for the next year.”
- Laura Metz and Brunella Reid, Chairs

Virtual Education Committee
“We offered some great programming in 2020. It took us a month or so to ‘pivot’ and determine what webinars our members wanted to see. One notable webinar was our May AAM High! Webinar, Weathering a Recession, Providing Value and Helping your Firm Recover, with Lori Colvin and Jeff Antaya. This webinar had the highest registration ever in AAM’s history. Also, our campfires were very interactive, and there was a ton of engagement.”
~ Dawn Wagenaar and Sarah Gray, Chairs

Website Committee
“We provided some updates to several different areas to the site including retooling the Growth Strategies page to remove the paywall, refreshing AAM Connect profiles and a lot of behind the scenes work that members will get to experience in 2021. We also provided support for the evolving conference situation, including working with the Summit/Emerge committees to keep members aware of changes and creating new pages as the events developed.

The blog continues to see an overall increase in traffic with September 2020 clocking the most page views since we started tracking. We worked with the content committee to generate a list of top 100 blogposts and are further integrating the blog with AAM Minute and Growth Strategies content.”
- Scott Dine and Chris Borkes, Chairs
A Salute To Community Service

The Association for Accounting Marketing strongly believes in giving back to the community. *We AAM to Serve* salutes corporate social responsibility by recognizing the efforts of small, medium and large-firms. Judges look at what the firms did to help their communities, who was helped, and most importantly, what impact was made. By sharing their story - whether it’s serving food, building homes, picking up trash, running a race or walking a walk - fellow AAM members can acknowledge the accomplishments of others and get some great ideas of how to serve their own communities.

AAM-MAAs Awarded 23

Number of AAM-MAA entries received More than 70

Number of We AAM to Serve Entries Received 9
And the winner is ...

The Association for Accounting Marketing’s Marketing Achievement Awards recognize outstanding achievement in accounting marketing. The 2020 AAM-MAA winners were announced AAM’s Virtual Award Ceremony on June 3, 2020.

Hall of Fame Inductees

- Lauren Clemmer
  Former Executive Director, AAM
- Mitch Reno
  Principal, Director of Client Experience, Rehmann

Marketer of the Year

- Annie Somermeyer
  Director of Business Development, SVA Certified Public Accountants

Volunteer of the Year

- Nicola Fleming
  Director of Marketing, Perkins & Co.

Rookie of the Year

- Siri Svay
  Practice Growth Specialist, PKF Texas

awards

Advertising

- Digital Advertising
  Bergan KDV
- Print Campaign
  Rea & Associates

Branding

- Integrated Branding Programs (budget <$100,000)
  Holbrook & Manter
- Integrated Branding Programs (budget >$100,000)
  Berdon LLP
- Logo New or Refreshed (budget >$100,000)
  HHM CPAs

Business Development Initiative

- Customized Sales Initiative or Approach
  Berdon LLP

Collateral and Content Marketing

- Announcements/Invitations
  Faw Casson
- Brochures
  BKD CPAs & Advisors
- Integrated PR Campaign
  Perkins & Co
- Publications and Newsletters
  MNP LLP

Events

- Budget <$9,999
  Berdon LLP
- Budget >$25,000
  Green Hasson Janks

Marketing and PR Campaigns

- Integrated Marketing Campaign
  Hogan Taylor LLP
- Nurture/Lead Generation Campaign
  Rea & Associates
- Recruiting Campaign
  HHM CPAs
- Social Media Campaign
  Keiter

Video and Multimedia

- Budget <$10,000
  Baker Tilly
- Budget >$10,000
  Brady Ware & Company

Website

- Budget <$24,999
  JLK Rosenberger
- Budget >$25,000
  BerganKDV
In 2020 AAM, partnered with satisfaction research firm ClearlyRated to see how we were meeting the needs of our members.

222
Members completed surveys

67.7
Overall Net Promoter Score (NPS)

6.9% NPS Improvement
Considered exceptional across industries – up from 2017 score 50.8%

NPS Drivers
Renewal = 9.3
Value = 8.7
Job Assistance = 8
Communication = 8.2
Diversity = 8.3

Value of AAM Resources
Conferences = 80%
AAM High, Campfires, Roundtables = 71%
AAM Connect = 66%
AAM Minute, Growth Strategies = 57%
Website = 51%
Budget and Compensation Surveys = 44%
Blog = 32%
Marketers Library = 23%
Podcast = 14%

“In 2020, AAM really provided support and community so we didn’t feel alone in one of the most challenging times in our careers.”

~ Jen Cantero, Director of Marketing and Sustainability, Sensiba San Filippo
The Association for Accounting Marketing produces a large variety of unique content designed to help accounting marketers gain the tools needed to help grow their practices. In 2020, AAM gave members access to the following content:

4 issues > > > of Growth Strategies addressing diversity, marketer’s role, business development and the remote workforce.

Growth Strategies, AAM’s quarterly thought leadership journal, underwent a major redesign, both in content and design, to present content in a more useful, reader-friendly package.

12 campfires > > > Virtual discussions with subject matter experts and members.

14 webinars > > > AAM High! webinars were presented on relevant topics and pressing issues in the industry for marketers and business developers.

11 roundtables > > > AAM Roundtables were lively discussions on relevant topics and pressing issues in the industry for marketers and business developers. AMM produced five Business Development and six COVID Roundtables.

4 episodes > > > Episodes of AAMplify! are available on YouTube, iTunes and Stitcher.

From blog posts to member posts, in 2020 AAM Members have produced 100 blog posts and 5,800 AAM Connect posts.
by the numbers

851 followers

3,819 followers

2,819 followers

296 followers

Website Visitors: 19K

Time on Site: 8 minutes 11 seconds

26 jobs posted to AAM’s job bank