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2018-2019

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Lauren Clemmer
Executive Director

Together, our people are the driving force of this organization and with their help we are able to remain true to the AAM vision of becoming “the premier resource for thought leadership, expertise and education regarding firm growth for the accounting profession.”

VISION 2020

AAM’s strategic plan, Vision 2020, 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 2020 we’ve actively and intentionally broadened our position beyond exclusively serving accounting marketers. This vision focuses on our role as an association for all accounting industry professionals responsible for impacting their firm’s growth and sustainability.
Welcome to the new era of firm growth, where embracing disruption and finding new opportunities amidst the growing challenges in the accounting marketing and business development areas are par for the course. Fortunately, because ours is an organization full of creative minds and problem solvers, adaptability is one of our strong suits ... and it shows!

To address ongoing changes in the industry, the Association for Accounting Marketing (AAM) is taking a closer look at the services and resources we currently offer to figure out how we can make your experience even more valuable. The result has been the development of four key task forces dedicated to growing and enhancing membership, AAM partnerships, sponsorships and content. Together, we will be better poised to identify areas of improvement while ensuring that our efforts continue to align with Vision 2020, our association’s strategic plan.

The work these task forces will tackle in the months ahead will take center stage. From launching new initiatives, such as a free 30-day trial membership, to performing a full, comprehensive audit of the association’s content to determine what works well and what could be improved upon, our future initiatives will help us deliver ongoing value as the industry continues to grow and evolve.

It should go without saying that all of these efforts couldn’t be possible without the help of our dedicated board, staff, and numerous volunteers. Together, our people are the driving force of this organization and with their help we are able to remain true to the AAM vision of becoming “the premier resource for thought leadership, expertise and education regarding firm growth for the accounting profession.”

As we grow, we remain aware of our responsibility to adapt to the needs of our expanding member base. Our association will continue to provide you with innovative tools, exceptional resources and the vital information you need to grow and strengthen your career every single day. Furthermore, we are committed to staying one step ahead of the changing marketplace. We are doing this by working to gain essential insight from our Major Firms Council and identifying ways to make content relevant to all of our members, regardless of their level of expertise, while listening to your feedback every step of the way.

As you flip through the pages of AAM’s 2018 Annual Report, I hope you will gain a better understanding of the work we are doing to stay true to our primary mission of growing people and practices. If you would like to learn more about our ongoing initiatives or if you would like to find out what you can do to help lead AAM into the future, reach out to me anytime. We are always looking for volunteers to serve on our fantastic committees and task forces and we continue to be grateful for your feedback.

Let’s make 2019 the best year yet!

Lauren Clemmer
Executive Director
associationforaccountingmarketing.org

A Note From Our Director
Always Growing, Never Settling

Not only can you find AAM members in all 50 states and Puerto Rico, our members also reside in Japan, England, Australia, Canada and Switzerland.

by the numbers

AAM Membership Continued to Grow

199 New Members in the past year

820 Total Members

21 Org. member firms

Member firms make up 50% of TOP 100 FIRMS
by the numbers

2018 Revenue Streams

<table>
<thead>
<tr>
<th>Source</th>
<th>Revenue (K)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Dues</td>
<td>$258K</td>
</tr>
<tr>
<td>AAM Summit</td>
<td>$473K</td>
</tr>
<tr>
<td>Event Registration</td>
<td>$41K</td>
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<tr>
<td>Sponsorship</td>
<td>$27K</td>
</tr>
<tr>
<td>Online Advertising</td>
<td>$8.9K</td>
</tr>
</tbody>
</table>

**Total Revenue:** $825K

by the numbers

**AAM SUMMIT 2018**

- **May 14-17**
- **Think Fresh in Portland, OR**

- **403** Number of attendees
- **42 sessions**
- **46 speakers**

$1,450 raised for the Portland Homeless Family Solutions

It was one of AAM’s best conferences yet (and I’ve attended a LOT). I loved all the fun ideas; you had to think fresh and try new things.
Refining our process by which AAM volunteers are paired with vacancies within various AAM committees, a group of dedicated AAM committee chairs conducted exploratory interviews that resulted in more efficient volunteer placements. Acting as AAM ambassadors, select committee members reached out to nearly 50 volunteers to welcome them and to conduct interviews to discern each volunteer’s interests, what they liked most about their jobs, what skills they excelled at, what experience level they had, and whether or not they had capacity to be involved in all aspects of a committee or to contribute on a project-by-project basis. Armed with this information, the ambassadors met with committee chairs to discuss the openings each committee had and to clearly define what they were looking for to fill the available spots. Having a process in place as people transitioned and committees lost members, helped to fill those voids by reacting quickly to send out a “call for volunteers” explaining any specific needs. Calls for volunteers to fill specific spots were then sent out via e-mails that described both the committee and the open role with the aim of improving volunteer to committee matches. Committees were also balanced to provide roughly the same amount of volunteers across each committee. By all accounts, monitoring the volunteer process helped to fill those voids by reacting quickly to send out a “call for volunteers” explaining any specific needs. We can respond to needs in a more timely manner.

Brenda Sleeper

Throughout the year, as people transition and committees lose members, having a process helps to fill those voids by reacting quickly to send out a “call for volunteers” explaining any specific needs. We can respond to needs in a more timely manner.

Brenda Sleeper

Due to the popularity of the content offered during AAM Summit, the association packed up its educational content and hit the road to bring accounting marketing tips and insight to the masses. In 2018, AAM on the Road brought full-day sessions to New York City, NY and Columbus, OH.

The two sessions focused on different topics. Our New York presentation focused on how to take your CRM to the next level. The presentation in Columbus reprised our popular “How to Create a Marketing Plan” session.

With the proliferation of new programming like AAM on the Road and the gaining popularity of companion programs like Virtual Campfires, AAM will be looking to create a more broad-based committee that encompasses all of the educational opportunities available and one which can assemble an overarching curriculum that can benefit members of varying experience levels.

Karen Love, Transitioned Shareholder, PKF Texas

AAM was key in me getting a seat at the table and becoming an equity shareholder in my firm. I have also developed a long-lasting professional and personal friendship database out of AAM.

* Committee statistics do not include board liaisons
A Salute To Community Service

The Association for Accounting Marketing strongly believes in giving back to the community. We AAM to Serve solutes 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 presents 2018 ‘We AAM To Serve’ Award At Annual Gala

The Association for Accounting Marketing’s Marketing Achievement Awards recognizes outstanding achievement in accounting marketing. The 2018 AAM-MAA winners were announced at the AAM-MAA’s Gala, in Portland, Ore on May 14.

Hall of Fame Inductees
- Jack Kolmansberger
- Herbein + Company
- Eric Majchrzak
- Beach Fleischman

Marketer of the Year
- Nicole Gantz
- Honkamp Krueger & Co.

Volunteer of the Year
- Rebecca Weland
- Rea & Associates

Rookie of the Year
- Katherine Koon
- GBQ

AAM-MAA’s Awarded

Crowe Horwath
Rea & Associates
KPM CPAs and Advisors

Number of AAM-MAA entries received – 112

Number of We AAM To Serve Entries Received

And the winner is...
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 2018, AAM gave members access to the following content:

**3 issues of Growth Strategies: the Journal of Accounting Marketing and Sales,** were published in 2018.

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

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

11 episodes of AAMplify! are available on YouTube, iTunes and Stitcher.

In addition to AAM’s quarterly print publication, monthly podcast and regularly scheduled webinars, the association boasts a treasure trove of valuable content. From the monthly electronic newsletter, AAM Minute, to the newest vehicle for accounting marketing content, CPA Growth Trends, you are sure to find the answers you are looking for.

From blog posts to journal articles, in 2018 AAM Members have produced 68 blog posts and 1.2K AAM Connect posts.

### AAM Career and Compensation Survey

Research shows the accounting marketing landscape is changing.

The CPA Trendlines-Capstone Marketing-AAM Career and Compensation Survey received 228 responses between March 19-April 6, 2018. The goal of the survey was to not only provide information on salaries and benefits but additional data for marketers to use in navigating their accounting marketing careers.

Marketing Directors (33%), followed by Marketing Managers (21%) made up the majority of the responses. The findings benchmarked salaries and benefits, job satisfaction, hours worked, and marketing budgets.

According to Jean Caragher, founder and president of Capstone Marketing, this year’s survey, which has been conducted regularly since 2013, included additional questions in an attempt to gain an even greater understanding of compensation and career fulfillment among those in the accounting marketing profession. “This survey is more than the salary and benefits numbers,” said Caragher. “You need to consider using the information in the survey to carve out your career in your firm and in accounting marketing.”

- 30% of respondents indicate their firms will be giving salary raises between 1% and 3% this year.
- The average marketing budget makes up 2.26% of a firm’s net revenue.
- The average number of people primarily dedicated to marketing and/or business development for firms with 100 or fewer employees is 1.13% or less.
- 24% of respondents say they are considering looking for another job in the next 18 months.
- 46% of respondents report that they are optimistic about what the next year has in store for them at their firm.

An Executive Summary, complimentary Members-Only Preview, and Full Report for purchase is available at www.accountingmarketing.org.
by the numbers

345 followers
2,304 followers
3,650 followers

Visitors: 25 K

Blog Visits: 6.7K

31 jobs posted
Get Social

Follow AAM on social media for pictures, news and event information!