

VISION 2020: AAM FOR THE FUTURE



Dear AAM Members, Alliance Partners, Sponsors and Industry Leaders:

The Association for Accounting Marketing's (AAM) newly developed strategic plan, better known as Vision 2020, provides clarity to our commitment to our members and their firms' growth and sustainability. AAM's mission is to grow people and practices. By providing industry-leading networking, educational resources and thought leadership to fulfill that mission, AAM delivers a unique value and collaboration not found elsewhere. Attached is a print-friendly version of key components of our strategy and future operating goals.

As part of AAM's ambitious **Vision 2020 Strategic Plan** and **2017 Operating Plan**, we are actively and intentionally broadening our position beyond exclusive service to accounting marketers. The new Vision focuses on our role as an association for all professionals within accounting firms who impact growth and sustainability. AAM's executive team and Board are aggressively building operations, programming and new products to benefit current members, as well as accounting practitioners and business developers.

AAM will be the association where all accounting industry professionals turn to acquire the strategies, tools and knowledge required to help their firms succeed.

To fulfill this **Vision**, we need to pursue a strategy based on four priorities: **Growth, Process, Knowledge** and **Positioning**. Key areas in which we need to excel within this scope include:

- Ongoing engagement with and satisfaction of new and current members
- Member education on cutting-edge issues, trends and thought leadership
- Timely learning experiences to help members facilitate the growth of their firms
- Development of products and services that provide guidance on industry issues
- Development of key relationships throughout the accounting industry
- Creation of AAM operational infrastructure to meet our goals

It is important to add that while AAM's refocused vision highlights our service commitment to all professionals responsible for firm growth, our long-time membership base of accounting marketers remains critical. AAM welcomes member feedback to support the association's journey to success. We hope you will be excited by our **Vision 2020 Strategy** and **2017 Operating Plan**, which you can read about below.

Finally, we invite your interest in getting involved. While we cannot guarantee a role for every volunteer, we ask that if you do want to help to please email info@accountingmarketing.org with the subject line, "I want to help."

To our members, alliance partners and others, we thank you for your ongoing support. We look forward to working with you as we "AAM" for a clear future of growth and success.

Growing people and practices,



Lauren Clemmer, Executive Director
Association for Accounting Marketing



Kristen Lewis, President
Association for Accounting Marketing

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VISION 2020



POSITION PILLAR

“AAM delivers targeted messaging to communicate our value propositions to members, firms and supporting organizations.”

POSITION 1: Position the Association for Accounting Marketing as the primary growth and sustainability resource across the CPA profession.

POSITION 2: Deploy branding strategy and marketing campaigns to build position as the leading thought leader, networking and educational resource in each of AAM's primary target markets: marketers, growth minded CPAs and sales and business development professionals.

KNOWLEDGE PILLAR

“AAM is the authority on CPA growth, providing thought leadership and process to key target markets.”

KNOWLEDGE 1: Use existing AAM content to build robust thought leadership platform for members and the accounting industry.

KNOWLEDGE 2: Create educational curricula for different AAM member segments in order to address their needs.

KNOWLEDGE 3: Create, aggregate and distribute top level thought leadership to target markets.

KNOWLEDGE 4: Partner with industry leaders and build alliances with industry groups in order to create, curate, distribute, and co-brand valuable content.



GROWTH PILLAR

“AAM generates revenue to build financial sustainability and facilitate organizational growth.”

GROWTH 1: Deploy growth strategies for each of the three primary target markets to achieve annual membership forecast.

GROWTH 2: Develop innovative sponsorship, advertising and packaged industry-relevant resources + programs that are collaborative and deliver value to the industry.

GROWTH 3: Increase member satisfaction and retention.

PROCESS PILLAR

“AAM streamlines operations to facilitate goal-driven action plans and organizational success.”

PROCESS 1: Create processes/structure to align and maximize the contributions of volunteers.

PROCESS 2: Identify and communicate evolving roles, responsibilities and annualized action plans.

PROCESS 3: Develop and deploy strategic operating action plans that are evaluated systematically and continuously.

PROCESS 4: Identify and deploy, on an ongoing basis, technology solutions to facilitate the internal and external work of the board, executive committee, committees and members.

PROCESS 5: Develop system to capture knowledge including sponsor and member relations, past initiatives, successes and failures, and records of other important organizational experiences.

AAM's 2017 OPERATING PLAN



Below is a sample of operating goals from each of AAM's four key priority areas. The full operating plan is available on AAM's website.

POSITION PILLAR 2017 GOALS

- Distribute an annual report on the state of the organization and present at AAM Summit.
- Identify and engage industry leaders on Accounting Today's '100 most influential list' and Managing Partner Elite, and CPA Practice Advisory 'Most Powerful Women in Accounting' lists. Develop. Deploy and execute outreach plan with multiple touchpoints and interactions throughout the year.
- Deploy brand task force to evaluate repositioning and rebranding AAM.
- Contact growth leaders within the Big 4 and other top 10 firms to evaluate growth and sustainability needs that could be supported through potential involvement with AAM.
- Evaluate and create one new award program (for MP, BD, growth leaders, etc.)



KNOWLEDGE PILLAR

2017 GOALS

- Determine evolving needs and research content/training needs for target market segments/specialties. Evaluate options within industry for aggregated and collaborative distribution.
- Create 2017 Editorial Calendar to guide all training and thought leadership deployed by committees.
- Develop and deploy industry's top Growth and Sustainability Trends Report via webinar, published report and promotional tool.
- Aggregate and create content for Growth Strategies, AAM High, AAM Minute, campfires, podcasts and other training programs following new content guidelines for emerging market.
- Deploy a content coding system for AAM's library that is reflective of AAM market segments, profession specialties, size and topic/curricula tracks.
- Perform technology audit to ensure efficient and effective content and knowledge transfer to members.
- Build out 2018 conference submission process with the requirements of AAM membership segments and curricula outline.
- Create a vehicle to communicate and continually promote a content catalog to members.
- Expand member outreach to identify new voices for content creation and redistribution to members.
- Continue AICPA, LMA, CPAFMA relationships and identify new alliance partners for three-year cultivation plan.
- Define and target 10 state societies for specific outreach to introduce content slate, road show programming and potential collaborations (based on member and projected member needs).
- Collaborate with the PCPS to create a definitive CRM document for the profession.



GROWTH PILLAR

2017 GOALS

- Conduct Member Satisfaction Survey and leverage results to create strategies to grow and retain members in future years.
- Retain more than 90% of members and generate 190 new members to achieve a 10% growth rate.
- Deploy monthly new member calls, new member roundtables and evaluation new member kit.
- Evaluate Member Appreciation Day and/or recognition program.
- Evaluate how to partner more effectively with Chapters to generate more value to members.
- Increase sponsorships and advertising revenue to fund expanded member programming.
- Program to identify firm sponsorship recognition [e.g. firms investing in our industry]
- Investigate and leverage AAM Linked In Group with special membership campaign to expand reach of current prospecting methods.
- Deploy Member-to-Member Campaigns and targeted segments to achieve goals.
- Conduct primary research with the CPA practitioner market to understand their growth and sustainability training and development needs.

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PROCESS PILLAR

2017 GOALS

- Update and communicate committee "AAM Roadmap" and Committee Handbook to provide comprehensive documentation about what committees do, committee descriptions, annualized action plans, who they are, liaison identity, meeting schedule and individual roles of committee chairs.
- Build volunteer succession plan.
- Build committee onboarding documentation that outlines responsibilities and committee's annualized action plans and goals.
- Develop, collect and implement demographic categories for members and prospective members to support effective knowledge platform delivery.
- Engage past presidents and other AAM volunteer leaders in capturing and retaining institutional knowledge.
- Create and deploy "AAM Process HUB" for operational ease and excellence.

Thank You to Our Pillar Guides & Volunteers

POSITIONING

Jean Caragher, Guide
Alice Grey Harrison
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Brenda Sleeper
Stephanie Chapa, AAMillennial
Meahgan Pear, AAMillennial

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Chris Borkes, AAMillennial

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Mitch Reno
Joe Kovacs

AAM Leaders, Volunteers & Staff

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Flashpoint Marketing
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KWC
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BerryDunn
- Mark Koziel, Environmental Scanning Council Liaison
AICPA

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