

## CHAPTER 23

# Creating Opportunities Through Community Engagement

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*“We cannot live only for ourselves. A thousand fibers connect us with our fellow men; and among those fibers, as sympathetic threads, our actions run as causes, and they come back to us as effects.”*

—Herman Melville

*“Our commitment to the community, not the transaction, is our recipe for success. When we lose sight of this, we lose our bearing.”*

—Pannell Kerr Forster of Texas, P.C.

## INTRODUCTION

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Making a commitment to participate in your community is one of the most effective ways to grow a CPA practice. Far more than traditional networking, community engagement and big-picture corporate social responsibility (CSR) can open doors to opportunities that set your practice apart. Any practice, regardless of size, can establish some level of community outreach.

CSR is important for several reasons. First, there’s the altruistic view expressed by Melville in the opening quote to this chapter. Connecting with the community will come back to you in many ways.

Second, CSR can help your practice establish its unique brand. Participation in community outreach helps people see your company in a positive light. It can also open up opportunities to talk about what your company does, and what it cares about.

Third, there is the effect of CSR activities on everyone who works for your company—especially your new recruits. When they have a choice, younger workers will opt to work for a company that allows them to participate in meaningful (and yes, fun) community philanthropy projects.

Yet every CSR program needs a solid business purpose and strategy first. “This is not the time to carry on marginal activities or to waste resources on initiatives that do not contribute to your future,” warns Art Bowman, editor of *The Bowman Accounting Report*,<sup>1</sup> “It is the time to put your faith in those activities that will build your future.”

This chapter offers a framework for building a CSR strategy from the inside out, in a very deliberate way. You’ll find tactics you can apply to your practice right away. You will see examples of innovative community involvement and how these initiatives can help a CPA practice establish its unique brand. You will learn how community

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<sup>1</sup> *Bowman’s Accounting Report*, August 2008.

engagement can contribute to practice growth and how to measure its return on investment (ROI). You'll also find ideas for outreach opportunities to consider as you start or expand your CSR efforts.

Benefits of engagement for your practice include the following:

- Any size company can benefit
- Nimbleness and alignment trump time and money invested
- Every team member becomes ambassador for the firm
- Appeals to altruism
- Supports employee retention
- Fits into life-work balance prized by employees and prospective employees
- Enhances practice brand and establishes niche
- Contributes to practice growth

### Key Concept

Making a commitment to participate in your community is one of the most effective ways to grow a CPA practice. Community engagement and big-picture corporate social responsibility (CSR) can open doors to opportunities that set your practice apart.

## 1. CSR IS A STRATEGY

CSR starts inside your organization, and becomes a natural outgrowth of the values your practice holds. The key to making these activities successful is to define an overall strategy and follow it just like you would a business plan.

Give your CSR strategy the same thoughtful consideration you would give any new business strategy. It needs to be backed by research and planning, implemented, and then evaluated. It should also have a place in your budget, however small. (It typically comes out of the marketing budget, which represents 3–5 percent of net revenue, but varies widely.<sup>2</sup>) While one department may be responsible for developing the CSR programs, everyone in the practice should play a role.

CSR initiatives should match the strengths of your practice. At PKF Texas, for example, one of our specialties is serving technology companies. So part of the strategy developed by our Practice Growth (business development) group was to sponsor a “Fast Tech 50” award program. We enlist members of the firm at all levels to assist with parts of the program. That gives us visibility among technology firms and a reason to communicate with decision makers at every technology company in the area. Our support of this competition fits our focus, and it sets us apart in the marketplace.

“Strategic positioning means performing different activities from rivals or performing similar activities in different ways,” states Michael E. Porter in an article on business strategy in *Harvard Business Review*. “Otherwise, a strategy is nothing more than a marketing slogan that will not withstand competition.”<sup>3</sup>

So how can you use what you already have *inside* your practice to become more fully engaged *outside* your practice? And how do you make sure your company does it differently, and better, than your competitors? You'll find steps to developing a successful CSR strategy in the sections that follow.

### Key Concept

Community outreach and CSR initiatives can include sponsoring an event, raising funds for charitable causes, doing pro bono work, or serving on the boards of community organizations. While those are among the opportunities you should consider, some of the most valuable CSR opportunities take a little more work to discover—or create from scratch.

<sup>2</sup> Association for Accounting Marketing (AAM)

<sup>3</sup> Michael E. Porter, “What Is Strategy?” *Harvard Business Review* (November–December 1996).

## 2. PLAN AND PREPARE

Like any business strategy, community engagement strategy should have the elements of research, planning, implementation, and measurement.

### First, Look Within

Poll your employees to learn who in your organization has personal connections to community organizations, school volunteer groups, professional associations and special causes. Having a personal connection is an authentic way to launch a CSR effort. If employees have a say in which organizations to support, they will be more willing to participate in volunteer projects.

In our practice, for example, a number of employees have a personal interest in supporting heart disease education, prevention, and cures. So we enlist a multigenerational company team to participate in a fundraising walk for the local chapter of the American Heart Association. We build excitement for the program with competitions and prizes, and that excitement spills over into our interactions with clients and the community.

### Identify Gaps in the Community

Discovering needs in your community is an important part of your background research. Talk to the leaders of organizations in your community to learn what gaps exist.

Questions to guide your research include the following:

- Are volunteers scarce?
- Are leadership positions going unfilled?
- Do they seek major donors for a capital campaign?
- Do they need knowledgeable speakers, trainers or accounting advice?
- Are there opportunities to judge award programs or serve on advisory committees?
- Do they need a place to hold board meetings or programs?
- Might they benefit from an introduction to one of your clients?
- And—this is very important—What are your competitors already doing?

Look within your practice to connect the dots, keeping in mind that the best strategy will serve those needs in a way that is different than what anyone else is doing.

#### Box 23-1

#### How We Found the Gap and Filled It

One of the organizations we participate in is the Greater Houston Partnership (GHP), a large chamber of commerce organization. Several of our young professionals (YPs) joined the business development committee of the GHP and reported back that there was a lack of YP representation within the partnership. Our team members were by far the youngest members of their committee. They identified this underrepresentation as a gap and we began working on a strategy to fill it.

Our firm's approach to marketing can be likened to a spider web, with different initiatives interconnecting to form a whole. This gives us the ability to use one program continuously without having to "spin a new web." By tweaking or adding another piece to the web, it grows organically. Our approach to using our YPs is no different; it is another part of our perpetual outreach into the marketplace.

To solve the GHP's lack of YP participation, we presented a business plan for the creation of a YP group to the GHP leadership. We felt we were in a good position to lead this effort, building upon the success we had already had bringing next-generation workers together within the company. While the creation of the group took some time, it finally gelled when we enlisted YPs to help with the GHP's World Trade Soiree. The young professionals brought a wealth of new ideas to promote the event. They planned the first-ever After Party following the soiree, and used social media, including a YouTube video, to generate "buzz." The Soiree had record attendance, and the YPs gained a foothold in the GHP organization by showing what they were capable of doing.

## Make It an Organized Effort

Who should “do” CSR? Everyone in your company should have an opportunity to participate in some way. When you sign up to help with a community fundraising campaign of any kind, create an employee task force to handle communication and logistics for the effort. Set a high, but reachable fundraising goal. Then provide incentives for employees who reach their personal fundraising goals. For example, create some excitement by letting employees donate \$10 for the privilege of wearing jeans and sneakers to work; or award an extra day of vacation to the firm’s top fundraiser.

Your company benefits by bonding together to support a great cause, and the community benefits from your willingness to support a charitable organization.

## Matches and Mismatches

Outreach efforts can fail when there is a mismatch between your company and the program, when expectations are not clearly defined, when employees get too busy to do nonbillable work, or when follow-through on either side isn’t done. Commitments on both sides should be in writing.

Leadership support of a company’s CSR efforts is essential. Some companies include community involvement or participation in professional associations as part of their employees’ career goals.

CSR efforts should not be done in a “Lone Ranger” style. If your company’s name is associated with an effort, or an employee is participating on your company’s behalf, accountability is essential. (This applies even to partners of the firm. CSR should be a collaborative effort within the company, not a haphazard, spur-of-the-moment episode.) A one-person activity may sometimes be appropriate, but if no one inside the company is aware of it, that activity will be an ineffective use of the company name or resources.

At PKF Texas, we hold a “B4UGo” (Before You Go) meeting. It’s a brief orientation about what we expect our team members to accomplish at a particular meeting or event. They’re expected to report back to the director of practice growth, and to follow through on commitments and contacts they make. We also equip them with materials to leave behind, if appropriate, or plan other ways to add value to their participation.

## How to Add Value to Your CSR Activities

Are the community groups you support doing something extraordinary? Help them brag about it. Use the communications vehicles you have available to you: a print newsletter, e-mail, news releases, or social media.

Here’s an example of a blog posting by one of our directors, who is actively engaged with Rice University and the Rice Business Plan competition.

### ***Rice University Graduate Entrepreneurship Program Ranked No. 5 in the US***

*Great news! Rice University has been named the number five for Graduate Entrepreneurship Programs by the Princeton Review and Entrepreneur Magazine. This year they jumped from 16 to five. That’s 11 spots! I’ve posted their press release below. Congratulations!<sup>4</sup>*

Another way to add value is to offer printed resources—not promotional materials—to the groups you interact with. These can have your branding on them, but they should be useful, educational and informative. Examples are article reprints about tax law changes for charities, white papers, newsletters with business tips, or a compilation of materials gleaned from your executives’ speeches or presentations.

One of our most successful “leave-behind” items is “The Entrepreneur’s Playbook.” It’s a small glossy-covered booklet containing excerpts from a weekly business advice radio show we host. Topics include cash management, recruiting, budgeting, fraud prevention and engaging next-generation workers. We also make an audio version of the shows available via our Web site.

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<sup>4</sup> [www.FromGregsHead.com](http://www.FromGregsHead.com)

### 3. WEARING YOUR AMBASSADOR HAT

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It's not enough to have employees or partners attend a fundraiser, pass out a few business cards, and dash back to work. Everyone should be tuned in to the CSR strategy and goals of your firm, and be on the lookout for new opportunities that fit.

When wearing the ambassador hat for the firm, each person is responsible for representing the firm in a positive light, and for finding new opportunities to *serve*, not *sell*. Yes, those cards should be exchanged whenever appropriate. The exchange should be accompanied with phrases like "I'll follow up with that resource for you," or, "I think you and Tracy should connect, I'll pass this along to her today." The ideal ambassador—the one who is welcomed at any event—serves as a connector of people and resources.

### 4. TRACKING YOUR RESULTS

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CSR results can and should be measured. Decide up-front what is within your ability to track, and make sure your employee volunteers are aware of what is being tracked when they return and report their community activities. Examples of things that can be tracked are overall attendance at events, number of companies represented, funds raised, and the dollar value of employee volunteer hours invested.

Tracking ROI for community engagement activities can be done using a spreadsheet to capture results of each team member. More complex customer relationship management systems may also be used if available. The type of system used isn't nearly as important as making it easy for team members to report their activity. The key is to track results consistently over time, so that ROI trends emerge from the data. Share the results at regular meetings so team members can see their progress. For more information about results tracking, see chapter 34, "Marketing and Sales Metrics Matter: Measure Results, Calculate Return on Investment."

Emphasize employee accountability and responsibility for following up on leads that their service may generate. Some companies tie in the accomplishment of CSR goals to an employee's pay-for-performance plans. This can be a very effective way of encouraging results-oriented activities.

Another way to track and prove results is to enter a successful CSR effort into a local, regional, national, or international awards competition. Putting together awards entries can take some time, but the payoff can be enormous. An award serves as independent public recognition of your programs. It reinforces and differentiates your brand. It showcases your firm's talent, and can help you attract new clients and employees.

Winning an award for a community engagement effort is not only great for team morale, it reinforces the value of CSR investments all the way to the top of the firm. Landing an award—or a whole shelf full of them—is a sure way to gain some extra visibility for your firm. Use traditional and social media to toot your horn about every award and its significance. Then keep those plaques and trophies polished and on display throughout your offices.

### 5. INCORPORATING OUTREACH STRATEGIES INTO YOUR CORPORATE CULTURE

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Ideally, your company's CSR initiatives enlist the willing support of everyone in your company. It won't always be possible to get everyone on board. Yet when community engagement is a part of your firm's written mission, individual employee goals, and corporate brand, it will be easier to attract employees and partners who value CSR.

#### Who's Your Champion?

Find or groom a "champion" within your company who will model and support effective community engagement. You may know someone who already demonstrates leadership in this area, or you may need to help someone discover their "inner volunteer" by encouraging them to take a leadership role in a small outreach project. Reward their efforts and accomplishments with recognition company-wide, along with new opportunities to lead.

Engaging the top-level executives in your firm may be a challenge, yet their participation is essential. Look for opportunities that are clearly aligned with your CSR strategies, and set up win-win scenarios that can be leveraged to create visibility for the executive and the company. (Sorting cans at the food bank is probably not where you want to put your CEO, but addressing the board of directors of the food bank on tax matters might be perfect.)

Among the other opportunities you might seek for your partners are as guest bloggers, experts on business-related TV and radio programs, judges for student business competitions, advisory board members for nonprofit groups or educational institutions, or keynote speakers for special events.

### Key Concept

Team members should be encouraged to begin building their centers of influence early in their careers.

## Preach What You Practice

Extend the value of your community engagement efforts by telling employees, customers, prospects and the business community how you are serving and why. Include these messages in all of your company communications vehicles, from a sign in your lobby to photos on your Web site.

To make sure your employees are engaged from the very beginning, incorporate messages about your company's culture of community participation in the information you give prospective hires and newly-hired employees. It should be a part of employee orientation and reinforced on an ongoing basis.

At PKF Texas, our culture perpetuates the professional *and* personal development of our entire team, including our young professionals (YP). YPs are the future of our firm. The advantage of focusing on the development of our people, and not tolerating "empty suits" is an engaged, motivated workforce.

## Celebrate Successes

Celebrate the successes of your employees and teams by recognizing them at gatherings, in your newsletter, in company news releases, and with special awards or privileges. For instance, in your newsletter, you might have a spotlight section to highlight the personal involvements of one employee each issue. Or, externally, consider nominating your internal talent for community or business recognition awards relevant to your industry or specialty. Even an end-of-busy season party or team lunch can acknowledge hard work and a job well done. These accolades serve as retention vehicles. They contribute to the intangible climate of the workplace.

## 6. FINDING NEW OPPORTUNITIES

Be flexible and nimble as you scan the business horizon for new opportunities for community engagement and partnering. Constant change means you'll need to re-adjust your CSR strategies regularly.

Consider allocating a percentage of your budget for unexpected opportunities. These may come in the form of new programs you decide to create, or for responding to sudden community needs. This "Opportunity Fund" should be defined in your budget, allowing you to respond quickly when funds are needed.

When you create an outstanding community outreach program, your competitors are going to catch on. If they decide to copy your program or move in on your CSR "territory," you'll know it's time to establish something new.

We have changed tactics and expanded our CSR programs numerous times. When we won a "best places to work" three years in a row, we decided to become a sponsor of the program instead of a participant. Then, when the program became saturated with our competitors, we shifted our sponsorship and founded a "40 Under 40" program with a local business magazine to recognize up-and-coming business leaders. This allowed us exclusive access to the award winners and gave us opportunities to begin building relationships with them.

We have also sought and found an excellent business alignment when we partnered with a university entrepreneurship business plan competition. This puts us in an excellent position to scout new talent or prospective future clients from dozens of prominent universities. It also associates our firm name with entrepreneurship.

## 7. EXPANDING YOUR HORIZONS: PERPETUAL OUTREACH

Planned and perpetual outreach initiatives, rather than occasional one-shot efforts, will help you achieve your CSR goals.

Look for opportunities within your firm and throughout your community. Consider these types of groups as avenues for expressing your firm's commitment to the community. Scan your business community's events calendars and you'll find plenty more, such as

- Chambers of commerce
- Economic development groups
- Tourism bureaus (destination marketing organizations)
- Professional associations
- University foundations
- Research foundations
- Alumni associations
- Minority business associations
- United Way organizations
- Health-related nonprofit groups
- Environmental and green causes
- Small business development groups
- Speakers' bureaus

## CONCLUSION

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With clear goals that express your firm's values, attention to community needs, participation of all team members, tracking of results, and readiness for new opportunities, your firm can establish its unique brand, maintain competitive advantage, achieve long term practice growth and make lasting improvements in your community. Let the outreach begin.

## ABOUT THE AUTHORS

**Karen Love** found the accounting marketing world in the mid 1990's, when business development was a word rarely heard in our industry. Operating in the 4th largest city in the United States with an environment of entrepreneurship and international flavor, Karen's innovative practice growth strategies and inside-out approach to practicing what she preaches has enabled the professionals at PKF Texas to infiltrate virtually every organization in Houston and internationally. Karen has mentored and blazed the trail for other accounting marketing professionals in her more than 15 years in the industry, and has been recognized as one of *Accounting Today's* 100 Most Influential People, a Marketer of the Year by the Association for Accounting Marketing (AAM), and was inducted into the AAM Hall of Fame in 2009. Her passion for corporate social responsibility began with her work on the Texas State Board of the American Heart Association, and continues to be an essential element of her leadership at PKF Texas. Her greatest joy is leading the PKF Texas Practice Growth team. Karen can be reached at [klove@pkftexas.com](mailto:klove@pkftexas.com).

**Raissa Evans** is the Senior Manager in the Practice Growth department at PKF Texas, where she has worked alongside Karen Love since 2003. With a background in technology, she brings nontraditional business acumen to the team. Active in the community, she is a member of a number of organizations, including the American Marketing Association, the Houston Interactive Marketing Association, and with Karen, co-founded the AAM Houston Chapter. She currently sits on the national Board of Directors for AAM. A member of the firm's Pipeline team, the *Leading Edge Magazine* and PKF University taskforces, Raissa is a key contributor to PKF Texas' internal culture through her project management skills and resourcefulness. Working closely with the Human Capital and Technology departments she provides input into shaping programs that will benefit the firm's internal and external clients. Raissa can be reached at [revans@pkftexas.com](mailto:revans@pkftexas.com).

