

Marketers Who Made Partner: Tips from the Trailblazers

By Aimee Lavallee, SBLR Chartered Accountants and Sally Glick, Sobel & Co.

When we first established the theme for this issue of *MarkeTrends*, we were curious to learn what the marketers who have become partners in their firms would have to say about the path to partnership: the pitfalls, challenges and opportunities along the way. What we discovered through several interviews, perhaps not surprisingly, was a similar attitude and common experiences among all the marketers. In just about every instance, we asked, “What changed in your role at the firm when you became partner?” Each time, the answer was basically the same: “Not much changed for me within the firm. I had always acted like, and been treated like, a partner — so there wasn’t much of a transition once I became one.”

It is critical to note that all these marketers had assumed the role and responsibility of ‘partner’ before they officially earned the title! Across the board, these marketers/partners share consistent traits that include energy, passion, leadership skills, and a desire for responsibility and ownership.

Here are some insights shared by a group of marketers who have been named as partners in their firms:



Leisa Gill

**Leisa Gill,
Lattimore, Black,
Morgan & Cain,
Nashville, Tenn., 48
partners, 400+ staff.**

Hard work does pay off, as well as focus, determination, cooperation and communication! These have been key ingredients in my success at LBMC. I love this firm, but when I joined it some 15+ years ago, I had no idea what I was getting myself into or if I would survive. Through the years, I have developed a great passion for what I do and as such contribute on so many different levels

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Leadership isn’t Enough to Get Marketers a Seat at the Table

By Suzanne C. Lowe, Expertise Marketing LLC



You’ve directed — quite effectively, you’ve been told — your accounting firm’s marketing program for years. Now, you’re eager to help your firm’s partners and executive managers make those critical strategic decisions that will grow the enterprise. You’d like to be offered a “seat at the table.” To get there, you’re prepared to work hard to improve your skills in leadership.

You’re in luck. There is lots of guidance available to you — in books, articles, blogs, conferences, and more. Fortunately, much of it is specific to the business models of the expertise industry.

But let’s be clear: the fact that you’ve demonstrated marketing leadership is important, but it is not the same as management. You won’t get a “seat at the table” of your organization unless you understand the difference. And, you have to consider how the management of a professional service firm (PSF) or business-to-business (B2B) service enterprise is changing.

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Letter From the President



Julie S. Tucek

committees, chapters and the Board of Directors. Transitions like this are rarely easy and without their challenges. We appreciate your patience as we work through these ‘growing pains’ to better position AAM to achieve its long-term goals.

Our plan is to continue to increase the value you get from your membership. Thank you to all of you who responded to our member survey — and that is a whopping 55% of our membership. You are telling us what you want and believe me, we are listening. The entire AAM Board of Directors reviewed the results at our fall meeting at the new Headquarters’ offices in Mount Laurel, N.J., on Oct. 5-6. You are telling us you want additional educational programming, a fantastic conference, a better Discussion List, a more functional Web site and more. Our committees and chapters are working very hard, along with the new headquarters staff, to make this happen.

To that end, your Board of Directors is focused on this year, but also on the future. We are working to align all of our activities with our strategic plan by looking at all of the AAM processes, chapters, programs, etc. to make sure they make sense to our mission. Improving policies, procedures, and efficiencies isn’t the most glamorous task, and as members, why should you care? Improving these operational areas now will allow our committees and staff to be more efficient, respond quicker, and better utilize our resources, which ultimately improves your membership experience. We want AAM to be the best organization it can be for all of us to continue to learn from,

It’s been a very busy, productive few months for AAM. Our transition to the new Headquarters is moving forward, with the new team getting up to speed with members,

enjoy, and embrace. We are also focused on working to enhance the value of the contributions that we as marketers bring to the accounting profession.

As mentioned above, we met in person at Headquarters to not only review the membership needs assessment survey but to also review the strategic plan with the goal of putting forth an operational plan to the committees in November. We are continuing our work on this and will be working with the committees once it’s complete.

AAM member Andrew Rose is spearheading chapter leadership quarterly conference calls for each of the AAM chapter presidents to brainstorm, share ideas and best practices, and work together to create a Chapter Manual. This will help us as we continue to grow at the chapter level. I sat in on the call and was quickly amazed by the enthusiasm, dedication, and valuable chapter meetings happening all over the country.

I thank each one of our volunteers, committee members, committee chairs, board members, past presidents and every member. Your passion and commitment to AAM is truly amazing. We would not be where we are today without all of your efforts. Mark your calendars for the 21st AAM Annual Summit, June 22-25 in Washington, D.C. Our conference chairs, Jennifer Johnson, Sally Glick, and Suzanne Verity have been working very hard to make sure this is our best, most educational, most exciting conference to date.

Please do not hesitate to contact me if you have any questions, feedback, suggestions, or just want to say hello. Again, thank you to all of you for your involvement in AAM.

Sincerely,

Julie S. Tucek
AAM President 2009-2010

Marketers Who Made Partner

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today than in those early years. I spent a number of years demonstrating how I added value to LBMC and I felt it was appropriate to be forthright about my goal of becoming a stockholder. I have a few words of caution if you are trying this at your own firm: promoting yourself only works once you have established a reputation in the firm for your wins, your capability when handling tough challenges, your willingness to go the extra mile, and your decision-making skills, especially where financial commitments are concerned. Before you say you want to be considered for partner, you need to show that everything you do is based on what you believe is for the good of the firm. You clearly adopt an 'us' attitude and the 'I' has to take second seat. Early on I learned the importance of communicating regularly with the managing partner to make sure he knew what marketing was doing, what was being accomplished, and to discuss how I could continue to broaden the scope of my role. At our firm, David Morgan, managing partner, has only one request of us: that we work hard and that we get along. It's the 'getting along' component that can be difficult at times for marketers, as it can sometimes feel like you are mixing oil and water when you pair together marketing and accounting — even in a firm with a strong family-like environment! That's where I have always played a key strategic role, helping create a culture built on common ground and the acceptance of new ideas. Sometimes it takes some hand-holding or nurturing to get everyone on the same page, but when you can validate the benefit of your efforts and see results on the firm's bottom line, you will gain momentum — and respect for yourself and the role.

When it was announced that I was to be made a stockholder, I initially expected some attitude changes. Most people who want partner status want it because they think it will give them more influence or more power in the firm. What I realized though, was that I had already been having an impact,

that I had enjoyed a strong influence and place of authority at the firm, because I had been behaving like a partner for years. It is my goal and also the goal of the LBMC marketing team to approach all the marketing activities, tactical and strategic decisions, and branding initiatives in the same way any of the partners would. They recognized and appreciated that trait and my sincere commitment. I always had a 'seat at the table,' being a stockholder just made it even more 'real.'



Neil Fauerbach

**Neil Fauerbach,
Partner at Smith &
Gesteland, Madison,
Wis., 16 partners;
85 employees.**

When I made the move to Smith & Gesteland, I stated very clearly from the outset that it was my goal to become a partner. First, however, I set some personal milestones that I believed I needed to reach. These included earning an MBA, developing some key internal projects for the firm, and generating new client opportunities as a part of my role as Director of Business Development and Marketing.

Once I had achieved these goals, I was nominated by one of the partners (that is the process we follow here). In accordance with this procedure, I was asked to submit a paper detailing why I wanted to become a partner. Then the partners who had acted as champions on my behalf gained consensus amongst their colleagues and I was elected to the partnership.

Interestingly, nothing changed at all internally. I have 100% the exact same role as I had before I became partner! As a Director, I had been attending all partner meetings, had been privy to all the confidential financial information, and was already accepted as an integral member of the leadership team. What did change for me was the perception outside the firm. Being named as partner gave me instant credibility and more respect than I previously enjoyed. Since I am in the community regularly

in my business development role, this recognition has helped me generate even more leads and opportunities for the firm.



**Elina Dicostanzo,
Principal at Cooper
Norman, Boise,
Idaho, 14 partners;
78 employees.**

Elina Dicostanzo

Years ago, my mother insisted that I obtain a degree in a profession where I would be able to support myself for life — so, I graduated with a degree in accounting. Although I was fairly proficient in my technical skills, I truly had no passion for the daily work.

After 15 years in the industry, I was in search of a more challenging position. I joined Cooper Norman and my real passion soon became clear. I determined that the role I wanted within the firm was NOT as an accountant, but as a Marketing Director. I approached the Managing Partner and provided him with a proposal for the job. I created and designed the Marketing Director role and after 16 years with the company, I am proud to say I became a partner ... the only full-equity partner Marketing Director in Idaho.

How did this happen? First, I would say I have devoted a great amount of energy, time and hard work to the firm. I am well respected within the partner group and staff, and my MP once told me that I "bleed Cooper Norman." I have been a significant contributor to the firm's growth over the years and I had also successfully trained partners and staff in sales and client service. These successes have, of course, been substantiated by the measuring tools we use in our firm. Finally, I had been asking to be a partner in the firm since the day I took the job in September 1993!

My words of advice for others with a similar goal: Remember that at times, silence can be golden. It is important to listen and listen carefully to what is going on around you. It is amazing what you will learn. Find a mentor.

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The best suited person for the role is not always the most obvious, so before you select someone, observe your relationships and interactions carefully. Unveil your agenda early on. Make it known that you want to become a partner and that you are willing to back your statement with your money. And of course, act like a responsible owner long before you are invited to become one.



Karen Love, Partner at PKF Texas, Houston, Texas, 14 owners; 150 employees.

For me, becoming a non-CPA owner was truly a labor of love. To make this

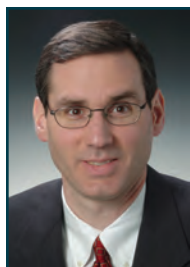
Karen Love

happen, I needed to set the stage right at the beginning of my relationship with the firm, and I was most effective when I was transparent in my desire to become an owner.

If you have hopes of one day becoming an owner, you must be sensitive to the firm's culture and carefully assess the willingness/reluctance among the partners when the topic of partnership/ownership is brought up. When you are trying to determine if you are being seriously considered as a leader in the firm, you must pay attention to the conversations you have at the firm. When you offer opinions, give direction or make suggestions, is there general agreement or do other partners argue with you?

This process is important for the firm, but it is also important for you. When you become an owner it is a serious commitment and you need to carefully consider if this is the type of firm that you want to be identified with until you are 65! Also, are you willing to take on the management of team members and be accountable to other "owners" at the same time? Be true to yourself and take the time to figure out what is most important in your pursuit of success and happiness.

If you want a position that has challenge, prestige and provides an entree into key decision makers in the business community, being an owner in an accounting firm can provide these intangibles. It is a labor of love, IF you love what you do!



Chris Perrino, Principal at Barnes Dennig, Cincinnati, Ohio, 15 partners; 3 principals; 82 employees.

Chris Perrino

It has been my goal for quite some time to become a principal because I wanted the recognition that is inherent in this title at a CPA firm; acknowledging value and effort. Our firm has a culture that respects people at all levels, but there is a unique credibility that comes with being named principal. This occurs both internally and externally — and it enables me to perform more effectively in my business development role.

You might ask what path I traveled to achieve my goal. When I joined the firm 12 years ago, I had about 11+ years of sales experience. Based on this expertise, I was able to gain the respect and trust of the partners because they realized that I was as good at my discipline of marketing and business development as they are at theirs. This more or less put us on a level playing field. They understood I could complement their technical skills by combining my business acumen and selling abilities with their accounting, tax, and consulting expertise — and together we have been able to consistently attract new business.

My advice to others who have partnership as one of their goals is to take ownership and listen carefully. I am attuned to the partners, as well as to clients and prospects, so I can address their issues effectively. I believe this has been one of the most important skills I bring to the table along with the ability to ask important, relevant, probing questions that help us uncover

a client's or prospect's needs and concerns. When you can point to quantifiable results, you are more likely to gain their attention for your efforts.



Eileen Monesson, Principal at Cowan, Gunteski & Co., 11 partners; 54 employees. Two offices located in N.J.

Eileen Monesson

After several years of experience in the accounting marketing field, I joined Cowan, Gunteski & Co., because I was attracted to their aggressive growth targets. Two years later, I was named principal. Our Managing Director views marketing as an investment in the firm, rather than an expense. This mindset was instrumental in my being named principal. He values the contribution I make to the firm, even though I am not a CPA and, for the most part, not billable.

If you have aspirations of becoming a principal in your firm, it is important to earn the respect of your partners and team. You do that by investing the time to know as much as possible about the accounting industry and how to sell professional services. You need to invest as much or more time in growing the firm as your partners do. Go out and seek opportunities for your partners to shine. If you are not out there, you cannot expect them to be! Work on making the partners and staff "famous," but do not forget to also make yourself famous!

Make it known that you want to be named partner and work with your managing partner to develop goals for you to earn the title. They have to see ROI in you. Take a seat at the table, and never, ever, do work that is not strategic or is more administrative in nature. Help them understand that you will only work on initiatives that will move the firm or the niche forward. Act like the professional you are and treat all the people you work with as your most important client. *AA*

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My point is not meant to diminish the capabilities or achievements of marketing leaders who have earned academic and professional credentials like MBAs, or awards and other kudos from their peers. Rather, it's about the more competitively critical issue of running a professional firm. It's about applying classic business management principles to grow market share and build the "right" kind of revenues.

It's about a new kind of stewardship that most professional enterprises don't employ today; this point certainly applies to accounting firms, too.

How Managing a Professional Firm has Changed

The difference between managing professional firms — versus leading them — came to light for me as I conducted research with scores of PSF and B2B executive managers, senior business developers, and seasoned marketers for *The Integration Imperative* (Professional Services Books: 2009).

Many of these people remarked about the early days of the professional and business-to-business service arena, where executive committee members and managing partners held almost honorary positions (more akin to figureheads than actual managers), and where marketers (often hired from public relations or journalism backgrounds), mostly undertook communication-oriented work. Leaders of professional firms tended to address marketing and business development effectiveness at the individual, geographic, or practice level.

This organizational model created a worrisome legacy for today's firms. When it comes to growing their revenues and market share, today's professional firms aren't effectively integrating their marketing and selling functions. Most firms — even smaller ones — struggle to overcome numerous organizational structural and cultural silos. Their functional disconnects prevent them from marketplace

effectiveness, impede their financial success, and hinder them from delivering optimal client service.

Even worse, professional and B2B service firms appear to be looking for marketplace effectiveness in all the wrong places: "Hire big-time rainmakers!" "Acquire that hot boutique firm!" The real Holy Grail lies inside the firm: harnessing people differently, ensuring that marketing and business development is integrated into every function.

Tomorrow's seat-at-the-table accounting marketers will be expected to manage their firms to achieve meaningful gains in competitive advantage and market share. To do this, they will have to harness the firm's people differently through three best practice structural frameworks and three new cultural paradigms that benefit all the firm's stakeholders.

Three Structural Frameworks

The Process Imperative: Tomorrow's seat-at-the-table accounting firm marketers will rigorously manage their organizations' go-to-market processes. This focus must be on more than just watching the hand-offs from one functional silo to another. The Process Imperative calls for the creation of a broader functional purview for marketing and business development, and a better prioritization of all marketing and business development initiatives. It also includes making the marketing, business development, and client service processes more discernible to everyone in the firm, and more obviously iterative. Too many accounting firms only focus on acquiring new clients or retaining them; they forget to formally review their strategic appropriateness. They act as if the marketplace stands still. Seat-at-the-table marketing managers know it doesn't. That's why they need to cycle back around periodically to other process steps — to challenge and recalibrate their assumptions and approaches.

The Skills Imperative: Tomorrow's seat-at-the-table accounting firm marketers will actively direct each person's pathway to marketing and business development

skills growth. Of course, many professional enterprises have well-recognized career pathways — but these are focused mainly on revenue-generating practitioners. The Skills Imperative calls for seat-at-the-table marketing managers to reframe the advancement pathways for practitioners and nonrevenue generating staff, and to more clearly direct the steps every person can take toward competency growth in marketing and business development.

The Support Imperative: Tomorrow's seat-at-the-table accounting firm marketers will purposefully reframe the lateral working relationships between their firm's administrative peers in human resources, information technology, finance, legal, and other operational functions. Many accounting firms already enjoy the results delivered by the friendly, informal working relationships that exist between these support functions and their marketing and business development colleagues. But seat-at-the-table marketing managers understand the importance of formalizing these support-function collaborations to drive real market share gains.

Three Cultural Models

Seat-at-the-table accounting firm marketers understand that managing the firm's "structures" isn't enough to achieve the kind of market share gains that equity holders seek. They must also manage three cultural models that foster the integration of marketing and business development.

The first cultural imperative is the adoption and communication of an updated organizational lexicon about marketing and business development. At too many accounting firms, people labor under serious misunderstandings about what marketing and business development actually are and should be doing. Managing marketplace gains cannot be achieved unless people understand each other.

The second cultural imperative is the creation of formal collaboration, shared accountability, and co-leadership standards for marketing and business development. At too many accounting firms, people experience problems

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with boundary confusion, unevenly assigned accountabilities, or feelings of marginalization regarding marketing and business development. It's hard to drive toward marketplace effectiveness when people aren't working together as best they could! Formality makes it real.

The third cultural imperative is making expectations more explicit about how everyone can contribute to marketing and business development. At too many accounting firms, job descriptions and performance measures are either nonexistent or outdated when it comes to outlining exactly how every function can help the enterprise achieve greater competitive advantage. Directing this cultural imperative is

where the difference between leadership and management is most obvious.

It's Time to Embrace New Management Principles

It's no surprise that accounting firms — like professional and business service firms in other sectors — are working hard to erase their legacies of siloed marketing and business development functions. For this new goal to be

realized, though, accountancies and their senior marketers will need to go beyond the best practices of leadership. They will need to embrace a new set of management principles about how to run a professional enterprise.

Senior marketers can help their firms to embrace these new management principles. It's the pathway to a seat at the table. **AA**—



About the Author:

Suzanne Lowe, the president of Expertise Marketing LLC, is the author of two books for leaders and marketers at professional service firms: *The Integration Imperative: Erasing Marketing and Business Development Silos — Once and For All* — in *Professional Service Firms and Marketplace Masters — How Professional Service Firms Compete to Win*. For more information see <http://www.expertisemarketing.com>.

Member Voices

An interview with Donna M. Erbs, Anders Minkler Diehl LLP
By Marsha Leest, CCH, a Wolters Kluwer Business



Donna M. Erbs

It's wonderful to be appreciated, and that's exactly how Donna M. Erbs feels at her firm, Anders Minkler Diehl LLP (AMD), St. Louis, Mo. (13 partners; 100 total staff) "Being the only

non-partner asked to participate in the firm's strategic planning meetings was a big deal for me," she said. "It made me realize the impact marketing has had on how the firm works. That's a big change from 2004, when I joined AMD."

With a background in public relations and commercial real estate, Erbs came to the firm with a bit of trepidation. She'd worked with CPA firms as a consultant, but wasn't sure what it would be like to be part of the team (she was their first marketing director).

She was hesitant after her initial greeting: her office wasn't ready and it was

the middle of tax season. "Since no one had time to talk to me, I had the luxury of exploring what had been done and setting up a plan for moving forward." Then, when she became involved in AAM, she realized the value of the camaraderie of her fellow marketers. "Hearing other people's war stories is comforting. You know you aren't alone when you are trying to build a marketing culture and teach CPAs to market. Location and firm size influence how marketing is done, and so does the marketer's level of experience. AAM is an invaluable educational resource."

Erbs notes that one of her greatest accomplishments is the firm's biweekly "37-minute pipeline report." She jokes that she consistently schedules the report for 7:30-8:00 am, but it inevitably ends at 8:07. The reports have resulted in the sharing of valuable information. In one instance, it got the firm in to see a target client. In another, it saved a lot

of embarrassment. As Erbs explains it, the firm was scheduled to meet with a prospective client. When the prospect was announced during the pipeline meeting, a partner revealed that the firm had represented the client's spouse during a contentious divorce litigation proceeding and had won. Ops.

This is just one example of how important good communication is in a firm, she contends. "And the marketing department is the cheerleading team for communications across service and industry lines and level of experience. Partners need the perspective of seniors and vice versa."

"At AMD," she continues, "my reward is having staff come to me and tell me that their training has paid off. They were able to make a presentation, or they wrote an article that was published, or they understood the combination of attributes that would put them on a path to partner. It's all very exciting." **AA**—

The Partner's Perspective

An interview with Gary Adamson, Partner, Brady Ware
By Kim Cooley, Henderson Hutcherson & McCullough PLLC



Gary Adamson

In 1989, when the management group at Brady Ware decided to expand from Richmond, Ind., into Dayton, Ohio, marketing was not just an option for the firm ... it was a necessity.

"Entering into a new market, we knew that no one knew or cared who Brady Ware was," explained Managing Partner Gary Adamson. "We had to market our firm just to gain public awareness. We spent a lot of time and effort at marketing just to get our name established. It wasn't something we just did — it was the key to our growth."

Adamson said his firm, with 12 partners, 100 employees, and three offices (Dayton, Ohio; Columbus, Ohio; and Richmond, Ind.), went from being non-existent in 1989 in the Dayton market to being the largest middle-market practice there today. "We are sitting in Ohio and Indiana and we have not had the luxury of being in a Chicago or Atlanta market, which are both areas of continued growth," he further explained. "We've really had to pursue business so marketing was never just a choice, it was crucial."

Marketing and selling have always been a way of life for Brady Ware. "I've heard a lot of partners from firms in major metro markets lament the fact that they have never had to really 'sell' until the recent economic downturn," Adamson continued. "Many say they've never been about 'selling,' but have had to learn to do so in today's economy. We've always been in pursuit of new business; we've always been about making it happen. It's been a way of life for us."

Brady Ware has embraced marketing to help build and establish its firm as a leading provider of accounting services

for several specific niche industries including manufacturing, construction and real estate, not-for-profit organizations, and automobile dealerships.

"Everyone in our firm is responsible for marketing," he said. "Linda Watson, our firm's Marketing Director, has been with us for over 10 years and has been instrumental in getting the firm anchored in the marketplace. But before she joined the firm, our administrator and other staff members actively took on our firm's marketing endeavors.

"I call myself more of the direct, aggressive type of marketer," he continued. "I ask for business with no hesitation. Others are not so comfortable with that type of marketing. I suppose my approach is more of a sales approach."

And while the two can complement one another, Adamson said there is a huge difference between marketing and selling.

"Let's differentiate between the two because firms spend a lot of money on marketing, but at some point, somebody's got to start selling something, especially in this economy," he explained. "Marketing is shelling the beach; selling is the troops landing on the beach."

Adamson has been a partner at Brady Ware since 1980, spending



MPP&W's Kristi Mattison collects a record seven AAM-MAA Awards at the 2009 Summit.

most of his time with the firm's A&A department and focusing on the firm's manufacturing niche. Now, as Managing Partner, Adamson says the firm is his biggest client.

"I channel most of my time to running the firm now," he said. "The firm's daily business consumes a lot of my attention. But I do love the marketing and selling aspects of my job."

Adamson said for him, the easiest sale to make is to an existing client, utilizing cross-selling techniques.

"Cross-selling is key to retaining clients and generating new service opportunities with them," he said. "Getting in front of our clients, showing them how and where we can help them in this economy, well, it's priceless.

"We offer a broad menu of services and we do a great job at selling them to our clients," he said. "And honestly, it's not really selling to our clients; instead, it's actually part of taking care of them. And if we don't take care of our clients, someone else will.

"I think in this economy and the current state of our industry, we need to get back to basics," Adamson continued. "Getting back to basics is taking care of your current clients. It also means asking for business from referral sources and clients.

"We have partners assigned to specific referral sources in each of our service areas and we are constantly asking our clients to refer us," he said. "We conducted a client survey last year and one comment appeared consistently — 'I would refer business to Brady Ware but they don't ask for it.' And client referrals are our best opportunity for new business but we were not asking for them. We've changed our ways and we are actually currently conducting a contest with managers and partners, keeping score on who is asking clients for referrals. It's been fun and productive, too." *AA*

AAM-MAA Best Practices

GBQ Connects the Dots to Draw Picture of Branding Success

By Melissa Brogan, Barnes Dennig



GBQ Partners LLC (13 partners; 120 total staff), located in Columbus, Ohio, connected the

dots to draw a picture of what an award-winning brand launch should look like. They were recognized for this effort at the 2009 Marketing Achievement Awards Gala in Austin, Texas, winning a coveted AAM-MAA in the Non-Print category for their use of a downtown wallscape advertisement.

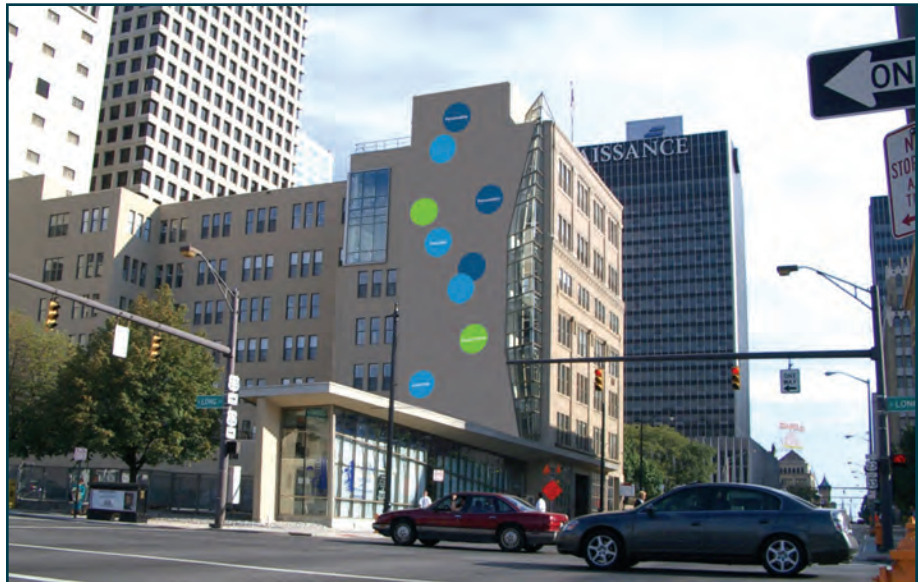
Connecting the Dots — Easy as 1-2-3

Capitalizing on the impending move to new office space and rebranding projects, GBQ wanted a fun, eye-catching campaign to introduce their new look to the Columbus community. The approach to their success was attained through:

- Building a buzz
- Raising awareness
- Engaging the community

Seeing Spots

The wallscape, with spots changing pattern once a week for five weeks, had drawn in the Columbus business community. The spots, mirroring the new



GBQ creates “buzz” in the community with their evolving wallscape.

GBQ logo, were colored on a six-story building in downtown, taking in many glances as it sits on one of the busiest intersections in town.

In addition to the spots, the building was also adorned with the Web site www.whatswiththedots.com to give clues as toward what conclusion the advertisement was leading. Teasers like, “A dot is the difference between

fortunes and pennies,” and “We cross Ts and dot Is; but nope, we’re not a marching band,” gave subtle hints to onlookers who were left wondering what all the dots were about. The hits to the Web site were a measureable means of analytics to gauge viewership.

Not So Off the ‘Wall,’ After All?

Though other professional service firms in their market have taken to advertising via wallscape now, GBQ was the first to do so. Their out-of-the-box creativity in piquing interest, building brand awareness and engaging the community has inspired other similar institutions to do the same. The media, including the Ohio Society of Certified Public Accountants’ (OSCPA) publication, *Catalyst*, was even left wondering, “What’s with the dots?”

After the dots came down, Robertson and her team followed up with a print campaign and mailing to further instill the new brand, new location and most importantly, to not lose the momentum from the success of the wallscape.

To learn more about this project, contact Sara Robertson, Marketing Manager at GBQ at srobertson@gbq.com. **AA**



The big reveal — GBQ’s final phase of their wallscape.

Mark Your Calendar and Join Us June 22-25, 2010

AAM Summit 2010: Building Strong Foundations for Firm Success



As you know, we work hard to provide meaningful themes in every issue of *MarketTrends*.

This issue focused on providing articles that share career information, being especially sensitive to the concerns of marketers who are looking for ways to enhance and enrich their role and responsibilities within their firms. The content is “real world” data, gathered from in-depth interviews with AAM members/marketers who have become partners and who were recognized for their impact on the firm’s growth and

for the impact of their leadership skills on the firm’s culture. These marketers have reached the highest positions

possible and they have candidly shared the challenges and the opportunities that have come their way.

Many of these individuals will tell you that AAM played an integral part in their success story. There is no better place to avail yourself of all AAM has to offer than at the annual AAM Summit. You’ll gain industry knowledge and insight and learn from those who have made accounting marketing their career and their passion. If you’ve never been to a Summit, make this the year you attend. In no other setting will you find this unique opportunity to network with industry experts, consultants, partners, and peers, identify best practices that can be directly applied to your firm, and be exposed to new ideas to help move your own career to new levels.

This year’s theme, *Building Strong Foundations for Firm Success*, focuses on how you can directly impact and support the business of your firm. You will learn from exciting, cutting-edge speakers who address the issues most relevant to you and to your firm. Don’t miss out on this truly one-of-a-kind opportunity to learn from the best and make your own impact in the world of accounting marketing. Mark your calendar and plan to join us at the 21st Annual AAM Summit, June 22-25, 2010, in our nation’s capital — Washington, D.C.! Watch the AAM Web site for more details — www.accountingmarketing.org. **AA**



THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success
 June 22-25, 2010 • Washington DC

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Marketer Toolbox

Five Quick Tips for Developing a Social Media Policy

By Alice Grey Harrison, APR, Dixon Hughes PLLC

Ready. Set. Go!
Wait ... Don't launch your engagement in social media without a well thought out plan which should include at its foundation a social media policy. There are many risks out there in "Twitterville," the "blogosphere" and "cyberworld." Regardless of whether you have 2,000 employees or 12, the risks are there. Be prepared and stay ahead of the communications curve by developing your policy prior to jumping head first into social media. Below are five quick tips to consider as you begin your journey into social media:

Base Your Policy on Your Firm Culture

Your policy must represent the culture of your firm. This means understanding the values and ideals of your firm. Listen, understand and then develop your policy. A progressive firm seeking fresh talent should have a policy that represents today's culture. Such a policy would embrace social media and provide guidelines on how to effectively use these new communication applications.

Develop Consistent Messaging

Use your existing firm policies that relate to communications such as your privacy policy and your e-mail policy as the foundation for a social media policy. Consider incorporating your social media policy into an existing policy to maintain consistency within policies. At a minimum, make reference to the current policies when writing a new



Burt Bierman of The Rainmaker Academy speaks with AAM Summit 2009 attendees.

policy. This approach helps your employees understand and manage expectations.

Clearly Communicate Consequences for Misuse of Social Media

Opening the door to social media means opening the door to your employees' thoughts and opinions. For your social media efforts to be successful as a communications tool, employees must understand the policy and the consequences of noncompliance. Be prepared for the employee who does not follow the guidelines or forgets how viral social media can be. Your social media policy should reflect the general consequences outlined in other policies. For instance, your social media policy should be aligned with your privacy policy. Clear expectations and consequences create a framework that

can facilitate compliant engagement in your social media strategy.

Define Who Can Initiate Social Media on Behalf of the Firm

There are two trains of thought on this subject: the more the merrier and only one firm voice. If you take a more-the-merrier approach, then your policy should communicate that anyone in the firm can initiate social media pages, groups and blogs on behalf of the firm. As such, each office or niche may have their own pages, groups or blogs. If you choose this approach, establish a monitoring practice so you can easily monitor communications for consistency, clarity and content.

If you take a one-voice approach, your policy should clearly define who the firm's spokesperson is. Typically, in this approach, the marketing communications team oversees all social media applications. In addition to writing content for social media applications, they oversee monitoring and addressing any noncompliant groups, pages and blogs. This approach is best if you are building a brand and have a clear communications strategy. The downfall to this approach is that it may be time consuming for your already stretched marketing department. *Note: a one-voice approach to participation in social media does not limit or prohibit employees from engaging in social media on a personal basis.*

Consider How You Will Address the Use of Firm Affiliated E-Mail Accounts in Social Media Settings

Your social media policy should include guidelines on when it is appropriate to use firm e-mail addresses in social media applications. For instance, if an employee has a personal opinion blog, it may not be appropriate to use a business e-mail address in association with this blog. However, using a business e-mail address for applications



About the Author:

Alice Grey Harrison, APR is the Marketing Communications Manager for Dixon Hughes PLLC. She has been on the forefront of integrating social media into the communications strategy of Dixon Hughes. Dixon Hughes is represented on Facebook, Twitter, YouTube, LinkedIn and Wikipedia. Alice Grey can be reached at 864.213.4042, agharrison@dixon-hughes.com or via twitter @alicegrey.

Marketer Toolbox

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such as LinkedIn® adds credibility and is a recommended application.

To avoid the risk of affiliating individuals' personal opinions with the organization, consider including a recommended disclaimer for employees

to use on social networking sites. There are a variety of ways to craft a disclaimer. For example, "The postings on this site are my own and don't necessarily represent the philosophy, strategies or opinions of XYZ company."

Final Word: As with all methods of communications, it is imperative to

begin with the end in mind. First define your goals and objectives, develop your strategy, and then base your policy and guidelines on the foundation you have set forth. Remember, the policy should be a living document and subject to change based on the rapidly evolving realm of social media. *AA*

Why a CPA Firm Makes a Marketer a Partner

Thoughts from Alan Sobel and Peter Levy, Sobel & Co.

Alan Sobel, Managing Partner, Sobel & Co., Livingston, N.J., 85 people; 15 partners

The first and most important premise that CPAs need to acknowledge when determining if they should have a marketing professional in the partner role is the agreed-upon definition of a partner. At Sobel & Co., partners are defined as 'the most senior executives at the firm.'

The second premise is that marketing is one of the key strategic components contributing to the success of the firm.

Once you have connected the dots between the first two premises, it is fairly obvious that the firm's marketing professional can become a partner in the firm. There are four main drivers for a firm — client service, growth/marketing, human resources and operations. Anyone functioning as a senior executive and leader

in any of these four areas deserves to be a partner in the firm.

It follows logically then, that the Director of Marketing, by definition, is a leader, a strategist and a senior executive of the firm. This assumes that the marketing professional demonstrates all the other attributes expected of a partner, including consistently operating as a senior executive, conducting her/himself as a leader in the firm, being well known in the business community and being well regarded in the profession.

The hardest part is convincing some of the more traditional CPAs to accept the first premise; that is, the broad definition of 'partner.' They need to understand that marketing (or HR, or Operations) plays a critical role in the strategic direction of the firm, and if the person leading that area is functioning at the highest levels, meeting all the criteria of a senior executive, then partnership is a reasonable and acceptable option.

If CPAs believe that only CPAs (i.e., service providers) should become partners, then they are missing, or ignoring, the significant contributions made to the firm's success from other, non-traditional professionals.

Peter Levy, Partner in Charge of Consulting Services, Sobel & Co.

What is interesting to me is that when I was part of the decision-making process

to invite our Marketing Director to become a partner (principal), my decision was based on recognition of her personal contributions to the firm. I appreciate her energy, her experience, her 100% devotion to enhancing Sobel & Co. With her guidance, I have seen our firm come together and build a culture that embraces marketing, something we had not done previously. The path to partnership was open to her as a way of acknowledging her specific skills and unique capabilities — and her impact on Sobel & Co.

This was an interesting exercise for me to go through because it demonstrated that there is still no consistent career track for non-traditional professionals working in public accounting firms. Unique individuals will continue to attain partnership status as more firms are recognizing the critical role that "non-CPAs" play for their firm, delivering everything from consulting services to fraud investigations to marketing.

As full-service firms continue to evolve, providing more than attest and tax services for clients, the less traditional services will become more embedded in the firm. Once this happens, it will become more common for the people who are leaders in these areas to be awarded partnership status. This shift will create a legitimate career path for anyone who makes such significant contributions to the firm's success, CPA or not. *AA*



Ingenuity Marketing Group collects one of two awards won at the 2009 AAM-MAA Gala in Austin, Texas.



15000 Commerce Parkway
Suite C
Mount Laurel, NJ 08054

Meet Your New HQ Team: Kim Libucki and Maria Ramos

By Erin McClafferty, Briggs Bunting & Dougherty

As I drove through the quiet, tree-lined office park in Mount Laurel, N.J. that is home to Association Headquarters Inc. (AH), it looked to me like AAM's new home is a nice setting for a work day. After visiting with Pete Pomilio, Kim Libucki, and Maria Ramos, AAM's team at AH, it was easy to understand why more than 135 professionals from all over the Greater Philadelphia area serve associations for AH.

AH, the fifth largest association management company in the United States, has been named a "Best Place To Work" by the *Philadelphia Business Journal*. Pete Pomilio, AAM's Executive Director, who was profiled in the last issue of *MarkeTrends*, believes AH more than lives up to the designation. With benefits like a social responsibility committee, fun committee, and employee advisory committee, the professionals at AH are engaged and happy — great for clients like AAM. "Happy employees do good work," said Pomilio. Kim Libucki and Maria Ramos, Pomilio's fellow team members, were no less enthusiastic about AH.



Kim Libucki

Kim Libucki, a six-year veteran of AH, serves as AAM's membership director. As membership director, Libucki liaises with chapters, coordinates member welcome calls, handles membership requests, processes dues, interacts with those looking for more information, and handles many other tasks. Rest assured that as the mother of an 8-year-old girl and an 18-month-old son, Kim knows how to effectively juggle many tasks at once!



Maria Ramos

For Maria Ramos, AAM's meeting manager, event management is in her blood. Maria's mother was a wedding planner, so Maria grew up around the business of logistics and detail and thrives in it. Her education followed her passion, and she earned a master's degree in event and tourism

management from The George Washington University. Prior to planning meetings for associations managed by AH, this certified meeting planner with more than 10 years experience was a meeting manager for American Express. Maria is also on the Board of the local chapter of Meeting Professionals International and was recently named the chapter's "Planner of the Year."

While Pete, Kim and Maria are the face of AH for our organization, AAM is able to take advantage of AH's organizational depth. On any given day, AAM touches many departments within AH, including data entry, Web, creative, accounting, IT, and registration. And because AH serves more than 35 association clients, AAM benefits from best practices shared among service teams and departments within AH.

As I walked through AH's offices after my conversation with Pete, Kim and Maria, I was met with smiles and hellos from many people I encountered. As AAM enters a new era, it's comforting to know that a friendly, passionate and capable team and organization will help take us to the next level. **AAM**