

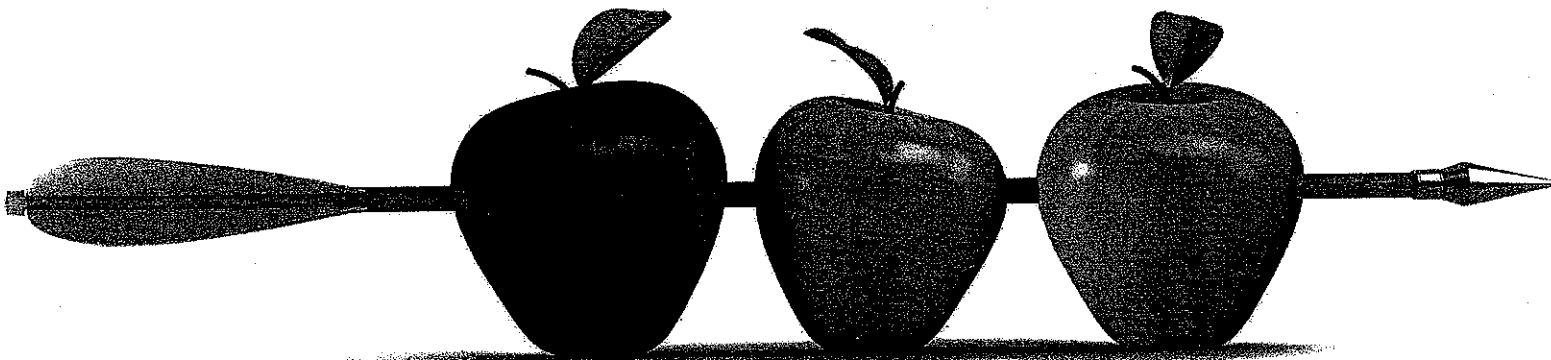
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# Bull's-Eye!

The Ultimate How-To **MARKETING & SALES** Guide for CPAs



Edited by Tracy Crevar Warren

**AA** Association for  
Accounting  
Marketing

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## CHAPTER 32

# *In-House Marketing Communications That Foster Success*

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### INTRODUCTION

Although we are more connected today with communication vehicles like PDAs, Twitter, and Facebook, it doesn't mean we are doing a good job of clearly communicating key messages essential to growing our practices. Just because we have more ways to connect, we often take for granted that our employees possess a clear picture of what's new in the organization, where our organization is heading, and what our employee's evolving role is in it. If we expect our employees to not only embrace marketing and business development, but to succeed at being our brand ambassadors, we must work proactively to provide them with clear and continuous communications reinforcing our marketing and sales initiatives.

In this chapter, we will provide you with a framework for building an effective internal marketing and sales communications function within your firm, including key components, ideas for implementing them, and the essential roles that firm and marketing leaders must play in bringing them to life.

#### Key Concept

Although we are more connected today with communication vehicles like PDAs, Twitter, and Facebook, it doesn't mean we are doing a good job of clearly communicating key messages essential to growing our practices.

### WHY ARE IN-HOUSE MARKETING COMMUNICATIONS IMPORTANT?

*Internal marketing communications*, or, as it is often referred to in the accounting industry, *in-house or internal marketing*, is in its simplest form, the sharing of information inside the firm needed to educate, inspire, and engage your employees to market the firm to those outside the organization. Effective in-house marketing communications are more important than ever as firms strengthen their practice development efforts. In fact, strong internal marketing is essential to developing a marketing and sales culture within your firm, while building your brand outside the firm. A growing body of research amply demonstrates there is a link between internal marketing and profitability.

Internal marketing communications serve several key roles in helping your employees to grow your practice including the following:

- Providing employees with a clear vision for your firm's marketing and sales initiatives
- Strengthening employees' understanding of their role in marketing and sales within the firm
- Reinforcing your firm's value proposition and how to share it with others

- Understanding firm services, capabilities and expertise, and how to convey them to external targets
- Understanding the firm's brand and how to bring it to life inside and outside the firm
- Highlighting new external marketing initiatives and how to get more involved with them
- Celebrating new business wins and recognizing those responsible for the victories
- Offering tips, tools, and insights to win more new business
- Providing inspiration for employees to get more involved in business development efforts

### Key Concept

A growing body of research amply demonstrates there is a link between internal marketing and profitability.

## INTERNAL MARKETING BEST PRACTICES

So what is needed for successful internal communications? *The Integrated Marketing Communications* department at Northwestern University conducted an Internal Marketing Best Practices study which identified six key characteristics that drive successful internal marketing programs. The six characteristics revealed in the study are as follows:

- *Senior management participation*  
Direct communication from c-suite executives and visible support from internal marketing leaders is necessary for effective internal marketing.
- *Integrated organizational structure*  
Most companies believe that it should encompass all communications with employees to maximize employee involvement and commitment.
- *Strategic marketing approach*  
When it comes to marketing internally, best-practices companies market to their internal constituents in a manner that parallels how it reaches out to acquire and retain customers.
- *Human resources partnership*  
For successful internal marketing, human resources staff must consistently seek to integrate innovative methodology to train, communicate, and foster feedback.
- *Focus on employee engagement*  
Employee engagement is a result of an efficient and collaborative work environment where employees feel involved and motivated.
- *Internal brand communication*  
All firms shared the basic principle that internal branding should inform and engage employees to consistently support brand initiatives.

These are important factors to consider as you look to strengthen your firm's internal communications. We will take a look at a number of these in the chapter.

## COMMUNICATION MUST START AT THE TOP

For new initiatives like marketing and sales to be truly embraced throughout the organization, they must be endorsed by the firm's top leaders. Employees look to key leaders to gauge what is important and what is not top priority, as schedules are increasingly stretched to their limits.

### The Role of Firm Leaders

Managing partners, niche partners, and executive committee members must find ways to incorporate key marketing messages into their regular routines. They must help facilitate the internal communications process with all levels of employees in all departments and support the role of the marketing professional. Whether at a new

employee orientation, an annual firm day or a partner retreat, their support through positive remarks can give strength to marketing initiatives. Involvement of firm management in the internal marketing communications program will build excitement for the program and establish added credibility and value.

## The Role of the Marketing Professional

For firms with marketing directors, the marketing professional is generally responsible for the overall internal marketing communications initiative. Success is achieved by positioning themselves as a leader through visibility, accessibility, and approachability. The spirit of marketing and the role each employee plays needs to be projected in a way that encourages participation. This requires communicating consistently, constantly, and with conviction. The marketing professional has to continually keep the employees informed about the industries and services offered by the firm. Employees need to understand not only what the firm's brand means but be comfortable in how to bring the brand to life through their actions. Marketing activities and accomplishments must be communicated to all employees on a regular basis. Consistent messages create expectations and add credibility to the process. Regular, ongoing communications demonstrate the priority and importance of the message, resulting in a strengthened marketing effort across the firm.

## DUE DILIGENCE

It's important to have a clear understanding of the existing marketing and sales culture of the firm before developing an internal communications plan. For firms with marketing directors on board, conducting due diligence generally falls into their area of responsibility. If your firm does not have a marketing professional on board, you could consider asking a key rainmaker or a marketing committee to assume this task. You could also consider retaining an outside marketing consultant.

A wide assortment of employees should be surveyed to gain an understanding of the existing marketing and sales culture. Key industry leaders, partners, accountants on various professional levels, new hires, seasoned veterans and administrative staff should be included in the survey. The survey should include such information as strengths and weaknesses of the firm, reasons they selected to work at the firm, their view on marketing, motivating factors, and comfort level of various marketing activities. The results will allow you to develop the right plan that will fit nicely with the unique needs and personality of your firm.

## INTERNAL COMMUNICATIONS PLAN

Just like an external marketing plan is essential to external marketing initiatives, an internal plan is the backbone of in-house marketing initiatives. As revealed by the *Internal Marketing Best Practices* study, best practices companies market to their internal constituents in a manner that parallels how they reach out to acquire and retain customers. This is an important consideration as your firm prepares its internal marketing plan.

Key components of the plan can include the following:

- Information vehicles
- Meetings and face-to-face connections
- Marketing tools
- Programs and training
- Measurement tools
- Resources
- Firm environment

### Key Concept

Just like an external marketing plan is essential to external marketing initiatives, an internal plan is the backbone of in-house marketing initiatives.

## Information Vehicles

One of the first steps in developing your communications plan is to select how you will get your messages out to employees. There are a number of vehicles for you to consider in the dissemination of information. It is important to select those that best suit your firm's culture. Employees need various vehicles for continual education about firm activities, services, and industries. The more of these vehicles used, and the greater the frequency of use, helps to build better informed staff. The firm's marketing director or communications director generally spearheads and implements these efforts. Consider these information vehicles:

- *Internal marketing & sales blogs.* A personal online sales/marketing journal that is frequently updated can enhance the firm communications. Employees can be updated about marketing events and activities with these blogs. Articles about marketing can be posted to the blog. The blog or Web log is a fast way to get articles and information up on the Web. Blogging may be done as often as desired—make sure it is relevant or it will lose its readership. Readers can leave comments so blogs provide an interactive format.
- *Marketing & sales sections on firm's portal or intranet.* A marketing and sales section can be added to the firm's portal or intranet. In this way, employees can read the latest marketing news and sales activities. The intranet can deliver news internally to the accounting firm and provide employees with an easily navigated window into the firm. Firm news can be communicated consistently and promptly to everyone at the same time with the intranet or Web portal.
- *Marketing updates.* Marketing updates can provide information about new clients obtained, clients and employees in the news, networking representation, new services offered, client success stories, employee promotions and nominations to boards, special programs, employees in the news, firm awards, etc. Marketing updates can serve to educate and motivate others to be involved in marketing activities. The key with these updates is to do them consistently and promptly. E-mail often works best as it can be delivered in a timely fashion. These can also be placed on the firm's portal or be left as voicemail messages.

At Islander & Company, a recent marketing update communicated to staff at our firm was a success story about LinkedIn. One of our CPAs was contacted via LinkedIn in search of a job in the Philadelphia area. This CPA was relocating to the area and read our employee's information about the firm on LinkedIn.

- *Internal newsletters.* Depending upon the size of your firm and the locations of various offices of the firm, it may be beneficial to have an internal newsletter. It can be transmitted via the intranet, your internal marketing blog, or written and distributed. There are three different kinds of newsletters depending upon the purpose and audience you are reaching. These internal newsletters include the following:
  - The Professional Practice Newsletter. Generally produced monthly or quarterly and distributed to all partners, managers and accounting staff. Industry group leaders and service leaders may submit updates and plans of their groups to be included in this newsletter. New accounting software can also be highlighted as well as priority items of the various groups, or upcoming future services or events.
  - The Employee Newsletter. It is directed to all personnel and communicates information about new hires, progress, and direction of the firm.
  - The Partner/Manager Newsletter. It may include pertinent news articles, changes in the profession and issues facing the firm.

## Meetings and Face-To-Face Connections

Meetings are crucial to internal communications. Face-to-face meetings have the highest impact because the message is animated in a variety of ways: facial expressions, tone of voice, and posture of speaker. However, meetings can be time consuming and it may be difficult to get all the staff together. When conducting meetings, they should be brief and relevant. Consider these in your internal marketing communications program:

- *Staff Meetings.* At staff meetings, it is important for firm leaders to offer inspirational marketing messages. Encourage employees to share their individual marketing efforts. The marketing professional can make brief presentations about a particular marketing aspect, service introduced, or client data. It is advantageous for the marketing professional to do this to increase their visibility while educating staff as to the role of the

