

Case Study: Using a Special Event to Build the Firm's Marketing Culture

By Jill R. Lock

At Isdamer & Company, LLC, we hold an annual formal dinner program early in the year to recognize the marketing activities of our staff. This extraordinary event, which we call "the marketing banquet," honors employees for their outstanding marketing achievements of the prior year. This article focuses on the format, goals and effectiveness of this event. Although attendance is not mandatory, it is understood that this is a major event to attend and that efforts should be made to attend. On average, about 95 percent of our employees attend.

The beginning

Our first marketing banquet was held five years ago, at the conclusion of the firm's marketing incentive program. This program helps employees understand that each of them has an important role as an ambassador of the firm.

Each year, our employees work diligently to implement the formal program and engage in various activities to earn marketing points. The marketing banquet adds fun and sizzle to our marketing incentive program, which encourages unity and team work. The event also serves to educate employees about the types of clients and industries we serve and the services provided by the firm. We have found that it also aids in the retention and recruitment of employees.

Our marketing banquet is a fun social event that everyone

looks forward to. It has become the kickoff of the busy season.

Keeping it fresh

To keep the concept fresh and lively, we keep the activities and any "special guests" (e.g., a local actor dressed as Benjamin Franklin) secret. Each year, we change the themes, length of the program, and the activities, but the venue is always the same. Music, props and decorations were used to support each theme.

Ties to marketing incentive program

The event is always tied in some way to the firm's marketing incentive program. Everyone participates in the marketing incentive program, which identifies nearly 100 activities in which accounting, administrative and IT professionals may have participated. These activities include such marketing tasks as the receptionist greeting clients by name or a senior accountant using her listening skills to identify a cross-selling opportunity. Each of these activities is assigned a point value. The points are tallied at the end of the year as we are preparing for the banquet.

Marketing activities that were recognized and encouraged included: contacting clients and just checking in (not the usual "where is your tax information" call), finding articles of interest and sending them to clients with a personal note, inviting clients to lunch or special event, finding articles about clients in the news, attending lunch-and-learns

or meet-and-greets, identifying prospects, adding prospects to the mailing list, etc.

Accountability is key

Recording these activities makes employees accountable and helps to identify employees who are committed to marketing activities. Employees are expected to record their marketing activities in the time and billing system each week.

Each activity is given a point value, and participation is monitored by the marketing director. At the marketing banquet, we paid tribute to the employees who earned the most points or engaged in the most or unusual marketing activities. The winners' accomplishments were shared so others could learn from them. These individuals and/or teams were recognized as the winners and awarded gift certificates and trophies.

Planning the banquet

All the marketing banquets are planned by a marketing committee, which includes employees from various departments at different levels. The committee typically consists of eight to 12 individuals who represent the firm's diversity. This allows the committee to obtain a broader perspective and strive to address the needs of our employees. Decisions are made by majority rule. Because the committee represents so many audiences, it facilitates buy-in to the event and helps spread the message about the event.

Creating buzz

There is always a surprise element at the event, whether it is an employee-directed and acted video, a special guest or an unusual activity. The marketing banquet is announced about a month before the event to create a buzz and excitement. Constant reminders are distributed to staff, along with hints of what may be expected at the event.

At each of the banquets, Scott Isdaner, our firm's managing member (partner), announces the award winners and distributes the prizes. Each winner gets recognition not only from all their peers but also individually from the managing member.

There is assigned seating at each of the banquets. This is done intentionally to facilitate mingling between employees

of different departments and staff levels. At some events, staff had been put into teams for the formal internal incentive program and therefore sat together with their team members at the banquet.

Photographs are taken at each event and displayed in a central meeting place and also electronically. Photos are also displayed on our Web site. These photos create lasting memories and help enhance the firm's marketing culture. Whether the viewer is a prospect, client, referral source or prospective employee, they can see that our firm has a unique side and learn more about our activities. To further this feeling and give the firm visibility, we contact the local media for coverage of the event. Two of our five events received coverage in the local media.

Gratifying results

Over the years, it has been gratifying to see how people have embraced the concept of marketing. It is our goal to continue to bring new people into this circle so marketing activities become commonplace and routine.

The Marketing Banquet has aided with the establishment of a marketing culture at the firm.

About the Author: Jill R. Lock is the director of marketing for Isdaner & Company, LLC/Bala Cynwyd, PA. Prior to joining the firm in 2003, she held marketing director positions with three other accounting firms in the Delaware Valley and has more than 20 years of experience in the field. Lock can be reached at jlock@isdanerllc.com.

Sample Themes

- *The Olympics:* Employees were divided into teams representing various countries. Country flags were used as table centerpieces at the banquet and teams sat at their designated country table. An Olympic-themed movie was played with employees as actors. Movie scenes included employees running down firm hallways passing the Olympic torch and participating in diverse marketing activities. Olympic style trophies were awarded to the winners.
- *The Kentucky Derby:* Music such as *Call to the Post* and *Run for the Roses* was played at the banquet. Roses and Derby photos were displayed at the event, and the employee movie used the logo created for the event and related Kentucky Derby photos. This program was called "Isdaner Derby Run for the Clients." The trophies were horse-related figures.
- *Jeopardy Game:* The game served as an educational component stating information about clients, industries and firm trivia. The game show music was played at the event. Each table selected an employee to represent them and participate in the game. Trophies were custom-made, depicting an Isdaner game board.
- *Murder Mystery Oscar Night:* Old Hollywood show tunes were played. Actors and an emcee were hired to direct the event. The mystery was solved by unraveling information about the firm and our clients. Trophies were imitation Oscars. Employees were encouraged to attend the event in formal attire for our own Isdaner Oscar gala.
- *Philadelphia Theme:* Each employee was given a Phillie gift bag with Philadelphia food items (Tastykakes, soft pretzels, Asher candies, etc.). Table names tied into the theme with different Philadelphia attractions. Employees also played the game show, "What's My Line" and depicted various clients. The special guests for the show were Ben Franklin and Betsy Ross. Later in the evening, Ben Franklin gave an inspirational speech about customer service and team work. +