Lunch & Learn Series Focuses on Clients

Periodic lunch & learns foster collegiality and cohesion among staff, as well as reinforce the commitment to fulfilling clients' needs across the firm.

By Jill Lock

Overview

The lunch & learns at Isdaner & Company are a series of a few scheduled lunches we hold periodically throughout the year that include appearances by client speakers. The events bring together all employees and provide them with firm and marketing updates, recognition of employees who have performed exceptional marketing activities, and presentations featuring clients as the main speakers. Some sessions given by clients or other outside speakers even offer CPE credit.

About five years ago, Isdaner & Company started including clients as the main speakers at its lunch & learns. We invite clients to speak about their business, suggesting the following topics for their speeches:

- their background as CEO and involvement in and establishment of the business;
- a description of their company and its mission statement;
- the products and services their business offers;
- industry trends;
- business cycles;
- accomplishments and awards;
- major competitors; and
- strategic plans.

In this way, the client's presentation provides detailed and relevant information to attendees, and they become informed not only about that particular business but also about its industry. Through being featured as the main speakers at these events, the clients feel valued and appreciate our interest in knowing more about their business and educating all of our employees about it. Employees also like learning about the diverse mix of clients we serve.

We have done this in a series of three for consistency with a specific time schedule to allow all of us to convene as a firm. Accountants come together throughout the year for various technical CPE training, but rarely do we all come together for a meeting. The lunch & learn series periodically brings all firm employees together. This is beneficial in sharing firm news and marketing updates. When we have outside speakers provide CPE, we keep it on a general topic so that the presentation is valuable for all employees. Past CPE presentations at our lunch & learns have been on topics such as dressing for success, business development, and business etiquette.

Logistics of the lunch & learns

At some lunch & learns, there is assigned seating to mix people up and put people together who do not normally congregate in the same place. Other times, there is random seating. An agenda is prepared for each session so attendees know what to expect. Outside client speakers are given from 30 minutes to an hour for their presentation. Outside speakers providing CPE are given a minimum of an hour.

Internal business and marketing reports are given at the beginning of the session and are brief, lasting no more than 15 minutes. The speaker is then introduced. When the main speaker finishes, our managing director offers concluding remarks and presents the speaker with firm logo gift items.

Attendees are given a menu prior to the event to make their selections for the catered boxed lunch the firm provides. We conduct the meetings in a conference room in a building that is within walking distance of our premises. We use this space to accommodate all our employees, plus the change of venue reinforces the value of the experience. It is important to let the speakers know that they will make their presentation at another venue and provide them with detailed directions. Also, I give the speaker my cell phone number in case he or she gets lost. This is a tip we learned the hard way when we had a lunch & learn that the client speaker did not show up for. That day I did not have my cell phone with me. The client had come to the right office building, but was unsure about which conference room we were convening in. He was invited back and given very specific directions—my cell phone number, plus we had a greeter at the office entrance to escort him to the right conference room. His presentation was one of the best.

Timing

We find that the best times to have these sessions are when we are not under pressure with deadlines. Typically, we hold the sessions in the summer, fall, and winter months after various deadlines have passed.

Planning the session

We encourage partners to make recommendations of client speakers. The client is contacted from six to eight weeks prior to the event and asked if he or she is available for the speaking engagement. This gives us enough time to find an alternative speaker if the first candidate does not work out. The speaker is then given guidelines on suggested talking points for the presentation and is invited to bring other colleagues to the session. We also ask whether audio-visual equipment will be needed for the presentation. Different speakers have different needs and comfort levels. One of the speakers we invited had a lengthy PowerPoint presentation that was filled with jokes to convey his message. Another client brought two employees to talk about the company—marketing and financial professionals—so we had two very different perspectives. Questions are typically held to the end of presentations. It is important that employees ask the speaker questions, which shows interest in the topic and lets the speaker know he or she was heard. We almost always have at least a few questions asked by employees at the end of client speakers' presentations. However, the managing partner and marketing director are ready with a few questions to ask of the speaker on the rare occasion when we do not.

The marketing director meets with the managing partner about one to two weeks prior to the session to review topics to be discussed and the order of presentations. Usually, the managing partner gives a firm update, congratulates employees on personal or business milestones, and recognizes a marketing maven. The marketing director also shares a marketing update at these lunch meetings and addresses such issues as significant new business obtained, summary of firm marketing activities, readership reports for our e-newsletter, and other relevant marketing information.

Because the client and guests might be in the room when we are announcing updates about our firm, we are sensitive about the personal nature of what we might be sharing. For example, we might not identify by name new clients that we brought in, but rather describe them in terms of their industry and size.

Announcing events

Each lunch & learn session is announced at least a month in advance. In fact, the sessions are usually announced two months in advance, even if the featured client speaker is not confirmed, so that employees can put the date on their calendars. Attendance at the events is not mandatory; however, the employees understand that their attendance is important and that they are expected to attend unless they have a client meeting or are on vacation or sick. Attendance by most employees is important because it shows respect to an outside speaker and demonstrates how we value his or her taking the time to join us.

Thanking the client

At the conclusion of the client's presentation, the managing partner makes relevant remarks related to the presentation, and then formally thanks the presenter for his or her time. As a thank you to the client, the managing partner gives the client speaker various firm logo items such as: backpack filled with golf shirt, baseball cap, tablet, mug, and pen. The client also receives a thank you note from the marketing director after the presentation.

About the author: Jill Lock is the Director of Marketing at Isdaner & Company, LLC. In this position, she builds and facilitates internal and external marketing programs. She provides leadership to an ongoing strategic process by establishing and communicating the firm's marketing goals and assisting in the development of operational policies.

Prior to joining the firm in 2003, Jill was the Director of Marketing at other regional accounting firms. She also worked in marketing positions for a closely held company, a legal association, and a business organization. She has more than 20 years of experience in marketing.

Jill has written numerous articles on business and communication topics for business and professional publications. Some of her published works include an article about working with the media in the Journal of Accountancy, a chapter about overcoming stumbling blocks in hiring a marketing director in the book How to Hire a Marketing Director and Make It Work, a chapter about developing seminars in an accounting practice handbook, and a chapter about internal communications for the book Bull's-Eye! The Ultimate How to Marketing & Sales Guide for CPAs.

Jill's professional affiliations include Philadelphia chapter president of Association for Accounting Marketing and past board member of CPA Marketing Report. She has an undergraduate degree in communications from the Samuel I. Newhouse School of Communications at Syracuse University and a Master of Business Administration degree from Wilmington College.

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