

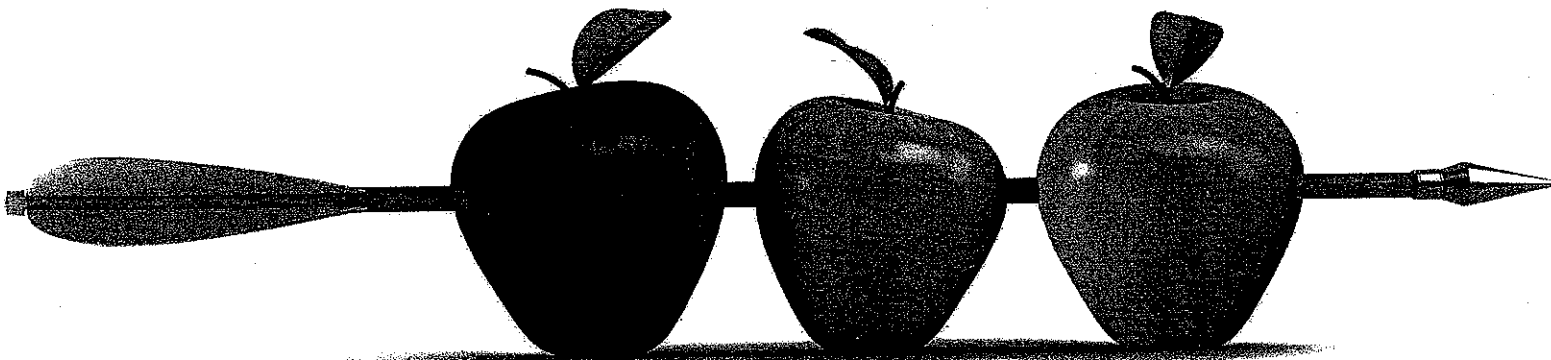
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# Bull's-Eye!

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

marketing professional in the firm. The marketing professional can bring employees into their presentations by remarking about a marketing success story by the employee and then the employee can be asked to elaborate on the story. The marketing professional should position her- or himself as a leader at these meetings and inspire others to discuss their marketing activities.

- *Marketing and pipeline meetings.* At marketing and pipeline meetings, members of the management team, niche leaders, and the marketing professional discuss opportunities for business and share the status of prospective business being pursued. Through this discussion, they develop strategies to obtain the prospect. Team members share what they know about the lead and their industry. They plan winning strategies with this information by working together using their expertise. This allows for opportunity management with a cohesive team approach. The marketing professional or managing partner may facilitate these regular meetings. Many firms hold them weekly.
- *Partner meetings.* Firm leaders should include marketing and business development updates at partner meetings. Marketing professionals should take an active role, positioning themselves as the marketing go-to resource. Topics could include new marketing initiatives, success stories, new business wins, and competitive intelligence, to name a few.

## Marketing Tools

There is a variety of marketing tools that you can use to better help your employees understand your brand, and to use in marketing your services to those outside the firm. These marketing tools include the following:

- *Marketing plan.* The marketing plan identifies a firm's overall marketing and business development goals and objectives, and the strategies and actions it will use to work toward those goals. Regular updates that communicate how the firm is progressing toward the achievement of its goals will allow your employees to understand how far they have come in reaching targeted goals, and know what work is yet to be done. For maximum effectiveness, the plan should be updated annually. Well-integrated internal communications are the key to executing your marketing plans. For more information on developing a marketing plan, see chapter 4, "The Marketing Plan: An Audit-Based Approach."

- *Marketing tool box.* The tool box includes those communications materials used frequently by staff to promote the firm. Employees need to be educated about how to use each of these materials and when they are appropriate to use. They should also be informed when changes have been made.

Internal communications materials include new account data sheets, proposal sheets, referral forms, and lost client data sheets. These forms/sheets help track new business, referral sources and lost clients. Information gained from these forms helps to measure past successes and determine sources of business. Premium gifts with the firm logo, brochure, fax sheet, firm fact sheet, biographies and business cards are all materials that are used externally and must all have a homogeneous appearance. Employees need to be educated about the availability of all the tools and the proper use of materials.

- *Marketing manual.* A useful reference tool is a detailed marketing manual. This manual can include sample client surveys, fact sheets, biographies, and a guide on how to network or present at trade shows, for example. It may also include tips on writing letters and preparing proposals, distributing premium items and cross-selling services. It's important to include copies of all client publications and promotional materials. Regular updates are encouraged, to help project a consistent image of the firm.

## Programs and Training

Various types of programs and training can enhance your firm's internal communications. These can include the following:

- *Marketing orientation programs.* Each new employee should meet with the firm's marketing professional soon after he or she joins the firm. The marketing manual, which was discussed in the "Marketing Tools" section should be reviewed with the new employee. It is also advisable to inquire about the marketing background of the new employee as he or she may have utilized various skills in past positions that would be an asset to the firm.



At Isdamer & Company, we hold a marketing orientation session for new hires and interns. This session includes firm history, partners' biographies, services, high profile clients and a description of major marketing initiatives. As a result of this presentation, they have an increased understanding of the firm and will be able to better market the firm.

- *Marketing and sales skills development programs.* These programs facilitate the development of marketing and sales skills at various staff levels and in different departments across the firm. They create appropriate marketing and sales expectations for each employee and build core competencies needed to market and sell. Sessions can address various subjects from firm history and capabilities including services, industries, and size of clients served; how to network with referral sources; the basics of communications skills; how to project the best image when visiting with a prospect; and the basics of selling to cross-selling and advanced negotiations, to name a few. To be most effective, courses should build on each other. Shorter, more frequent sessions are more effective than longer less frequent sessions. These CPE courses also provide the opportunity to update your personnel on current marketing and sales initiatives in your firm. For more information on sales training, see chapter 31, "Sales Training: The Key to Better Service and Better Clients."
- *Industry Groups.* Employees need to know the expertise of the staff and the industries they serve. In this way, they can be fully aware of the range of expertise available at the firm and the proper referrals to be made. Constant and frequent communication needs to be made so all employees know the individuals within the industry groups and the type of clients served. Employees also need to know the background of the individuals in the groups. The more employees know, the better marketers they can be. This internal communication is essential.

At Isdamer & Company, we use "lunch and learn" sessions to highlight industries and invite client speakers to speak about their industry. So in addition to our employees talking about an industry and attending industry meetings, we invite clients in that industry to make a presentation. This has been well received by our employees and clients feel valued by being a featured speaker at this event.

- *Incentive Programs.* Incentive programs can help create a marketing culture within the firm. For the program to work, the concept must be embraced first by management. The program can help in enhancing client service, building new business and developing relationships, and assisting in recruiting efforts. The length of the program may vary according to the firm's objectives. For more on incentive programs, see chapter 33, "Effective Employee Incentive Programs: How to Bring Out the Best in Your Firm."
- *Value added client service programs.* It is always prudent to first serve your clients with excellent service before trying to obtain new clients. Existing clients are the best source for referrals, whether it is cross-selling new services to them or asking the clients to refer their friends to your firm. Value added client service programs help ensure that clients are receiving quality service from your staff and that the bond between the client and the firm is deepened. Such a program may include examples of superior service or introduce employees to client service standards. For more information on client service programs, see chapter 36, "Developing a Service Excellence Plan for Clients."
- *Team building programs.* Employees need to understand that the firm is a team and team players must work together toward a common goal. Team building is a process of enabling the team to achieve a common goal. By working together and using the strengths of individuals, the client bond becomes tighter and prospects and referral sources become aware of the full range of experts available. This increases the leads that the firm gets. Powerful and fun exercises may be used to communicate these concepts. Incentives should be established to facilitate these views. An outside facilitator or marketing professional can conduct these types of program. They can be an all day annual event in conjunction with shorter meetings throughout the year to insure the implementation of the team building concepts.
- *Employee recognition programs.* This type of program recognizes employee birthdays or special employee milestones or contributions. It can be as simple as an e-mail announcing birthdays of the month with a cake at a staff meeting to a more elaborate annual dinner/lunch program recognizing the milestones of various employees. At various anniversaries of employment, you may want to distribute special items with the firm logo or a gift certificate to the employee. The goal of the program is to show how the employee is appreciated and valued and an important addition to the team. This program can also aid in employee retention.

## Measurement Tools

For employees to gauge how effective your marketing plans are, it's essential to report on your progress against the plan. There are a number of tools that you can use for tracking business and marketing initiatives including the following:

- *Data tracking.* Forms such as a New Account Data Sheet, Proposal Sheet, and Lost Client Form can be useful internally to track and measure the success of gaining clients in a particular industry group and understanding the reasons when the firm is not chosen for a proposal or a client is lost. Tracking data helps to measure the success of various marketing initiatives and also gives the firm a barometer of where it is has been and is headed. These forms should be updated to reflect any new services or industries. For more information, see chapter 34, "Marketing and Sales Metrics Matter, Measuring Results, Calculating Return on Investment."
- *Budget.* Before developing the budget, the firm must have goals and strategies to achieve those goals. A marketing plan will help in the development of the budget. Use the plan to estimate the cost of the activities outlined. If the firm is trying to establish itself in a new marketplace or service area, more money will need to be allocated to establish your market share objective. A marketing budget should be developed so each year, money can be specifically allocated to a particular marketing area and used as a measuring tool. Later, the budget will be evaluated to determine if the money was well spent. A budget should be developed annually. For more information on budgeting see chapter 8, "Budgeting Techniques for Today's CPA Firm."

### Key Concept

For employees to gauge how effective your marketing plans are, it's essential to report on your progress against the plan.

## Resources

There are a variety of resources that can be used to enhance internal communications including the following:

- *Employee surveys.* Various employee surveys can be developed depending upon the goals. If you want to initiate a marketing program or incentive plan, it may be helpful to survey the employees about their marketing strengths and weaknesses and key motivating factors. A participation activities survey to employees can identify areas of interest.
- *Research tools.* Before going on a prospect meeting, it is important to do as much research as possible to understand the prospect's industry and needs. Start first with searching the Web about the prospect. Also ask in-house if others know the prospect or people on the prospect's board or prospect's lawyer, banker, and so on. Various software programs are available to provide industry background and give benchmarking financial ratios. Many Web sites also feature information on nonprofits and public companies. Use all available tools to position your firm as a strong candidate for the prospect's business.
- *Marketing advisory groups.* Developing a marketing advisory group to include all levels of professionals in various service and industry groups can help in strengthening and transmitting the marketing message. This group can be a useful resource to the marketing professional for feedback on ideas and to influence the outcome of a program. The marketing professional should lead this group, develop the agenda items with group input and meet periodically.
- *Marketing idea fairs.* Because many great marketing ideas are initiated at the grassroots level, consider a marketing fair. The purpose of the fair is to recognize the creativity of your people, and allow all personnel to gain ideas that can be applied in everyday marketing. Categories of entries can include proposals, newsletters, advertising, press release programs, trade show activities, direct mail campaigns, referral programs, client service programs, and e-mail correspondence. A narrative should be submitted with each entry that includes all of the following category of the entry, description of the entry, target, costs, marketing objective, and marketing results. Share the results with our entire firm.
- *Communications audit.* This audit analyzes how communications are conducted by a department and office. Such an audit addresses method of transmission, timeliness of information and consistency of message.

## Firm Environment

Your firm's office and its environment affect communication and send a strong message about who you are. Be aware of the image your environment is creating. The image should be consistent with your brand and how you want to be viewed.

- *Reception/conference rooms.* The reception area is the first area a visitor to your firm enters. The appearance of the area as well as how the visitor is greeted makes a lasting impression. The appearance of your reception area and the attention given to visitors has a great impact on the firm's image. Consider a streaming video with your firm's story on a flat screen monitor. Only carefully considered, current magazines and brochures should be displayed neatly on coffee tables. All visitors should be greeted in a friendly, pleasant manner. The receptionist is the Director of First Impressions as he or she is the first person the visitor sees as entering your firm. Make sure they take the role seriously and convey the appropriate image of the firm. The same care and attention should be given to your conference rooms. Make sure they speak volumes about your brand to visitors. Think about the furnishings and how they are maintained.
- *Other display areas.* Marketing materials can be displayed internally for the employees at a central meeting place such as the lunch room or employee lounge. It is helpful to display in the public employee area things such as news articles about employees and their family members and clients, inserts in newsletters, and breaking industry news. This display helps to keep everyone involved in the events of the firm and recognizes special achievements of employees and clients.

## KEYS TO SUCCESS

Good internal communications are essential to your external marketing and business development efforts. Here are some keys to success to consider in your firm:

- Make internal marketing a top priority
- You can never over communicate—frequency is essential
- Start with a plan—one that parallels your external plan
- Establish an in-house marketing program before developing an external program
- Top leadership's ongoing involvement is essential
- Help employees understand their role in marketing the firm—start by helping them to understand how to bring the firm's brand to life
- Share consistent messages across the firm
- Consider a variety of communications vehicles—people process information in different ways
- Mix it up by adding new ways to communicate
- Make it fun

## CONCLUSION

Each employee has a role in marketing and an impact on the way the firm is perceived to outsiders. This does not simply happen by chance. If we expect our employees to be the best marketing and brand ambassadors they can be, we must start inside the firm with a well-planned internal communications program. The goals of the in-house marketing communications program are to instill a consistent image of the firm by illustrating how each employee projects that image and to impart a sense of employee commitment to the firm by appreciating the contribution of each team member. When employees understand where the firm is heading, see the role they play in it, and receive recognition for their contributions, your firm will build a stronger marketing culture and ultimately achieve success through growth and profitability.

## 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. Prior to joining the firm in 2003, Jill was the director of marketing at other regional accounting firms. She has more than 20 years of experience in the marketing of accounting firms. Jill has written numerous articles on business and communication topics for business and professional publications.