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Marketing is a crucial part of building any business, but one with which accounting

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CPA.com sat down with some top marketing professionals to get their expert advice for accounting firms on how to build a successful marketing program. The panel included:

- [Pauline Gonnering](#), Director of Growth and Operations at Cummings, Keegan & Co. P.L.L.P.
- [Joe Kovacs](#), Director of Marketing & Business Development and Councilor at Buchanan & Mitchell, P.C.
- [Jane Willis](#), VP of Marketing, Accounting Channel at Bill.com
- [Sheila Geiman](#), Channel Marketing Manager at Sage Intacct

*In the first article of this series, our panel shared insight about getting started, including strategies for setting objectives and expectations. In this second and final part, they offer tips for executing the plan.*

Starting a formal marketing program at your firm is an admirable accomplishment, but the work doesn't end there. Accounting has become very competitive in recent years, with technology being a real game-changer. Rather than simply competing against other local accounting firms, you're now likely to go up against firms nationwide, thanks to their ability to provide virtual services and reach potential clients on the opposite coast through internet campaigns.

Once you've evolved beyond the simple word-of-mouth marketing, what's next? We asked the panel about the steps to take to amplify your marketing efforts once you've made a successful start.

## Standing Out from the Crowd

Differentiating yourself from the competition is one of the best ways to attract and keep clients in today's competitive market – after all, not all accounting firms specialize in the same types of business.

Jane Willis advised firms looking to stand out to pick a niche where you can develop

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leads are growing fast.”

Pauline Gonnering agreed and added, “Define a specific target persona – and think from that specific point of view. Know your firm’s unique selling points. The message will occur when you mesh them together.”

Joe Kovacs was quick to point out that differentiating yourself is about more than simply saying you have the best people.

“Obviously, you need to understand what is different from other firms that you offer the market,” he said. “Do a competitive analysis, take a realistic view of whether you are, in fact, differentiated. If you’re not, then ask, what kind of investment are we willing to make to do so? Where’s the greatest strategic value? It might mean picking up an unusual certification or offering a service that isn’t common and marketing it effectively. Know your market, who is in it, where you are.”

Thought leadership – showcasing the expertise within your firm – also offers a valuable marketing edge.

“Speaking engagements, whether at large conferences or in more intimate settings, webinars and podcasts, are excellent channels for promoting an individual’s thought leadership,” said Willis. “It is also worth the effort to create strong educational content such as blog posts, white papers and email campaigns.”

## **The Top Marketing Tools to Have in Your Arsenal**

Technology plays a major role in marketing in the digital era. We asked the experts about the marketing tools they recommend.

Willis and Sheila Geiman agreed on the basics for marketing technologies. At a minimum, firms should incorporate email, databases and business websites into

their marketing. On a broader scale, building the ideal technology stack for

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analytics. The more you can automate your marketing, the more content you can generate, and the more customers you can reach with less time and expense.

### **Bonus Points: Reviving a Stale Marketing Campaign**

Marketing is dynamic. What worked in the past might not work in the future. What if your firm's marketing has gone stale? What's the best way to revive it?

The first step, according to Kovacs, is understanding why people think it's stale and identifying the problem.

"Part of that may be understanding what people expect, which may not have been communicated. Have a frank conversation about expectations, where they are now and how to bridge the gap," he counseled.

Once you understand the problem, it's easier to address. Gonnering suggested, "Use industry benchmarking reports and resources to advocate for changes based on what other firms are doing."

Willis stressed the benefits of communication, saying, "Getting out and talking with customers and prospects is the best way to get new ideas. You need to talk with customers about their pain points and their opportunities, so you can connect your services and your marketing to solving those needs."

The marketing experts also identified education and networking as key components to boosting creativity.

According to Willis, "Keep learning. Go to conferences or take classes, read blogs and articles, look outside your own industry and take lessons from forward-thinking verticals."

“Regularly chat with other marketers and other sources like vendors or consultants

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passionately in what AAM does,” commented Kovacs. “The marketers you meet, the professional development opportunities and resources are invaluable. I would not be the professional I am today without it.”

Geiman perhaps summed it up best: “The most important thing to do is to keep trying and moving forward.”

The best ways to boost marketing and keep it fresh will vary for each firm depending on its goals and resources. For more strategies and expert tips, check out the [5 Key Principles of Successful Accounting Firm Marketing](#), presented by CPA.com in collaboration with the [Association for Accounting Marketing](#), [Bill.com](#) and [Sage Intacct](#).

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Michael Cerami joined CPA.com at the company's inception in January 2001 as Vice President, Strategic Alliances. Since then, he has been a key contributor to the company's growth through the development and execution of a market-leading alliances strategy. Michael fosters a partnership philosophy at CPA.com that emphasizes business strategy alignment, creating mutual long-term value and a commitment to empowering the accounting profession for success in the digital age.

In addition to his Alliances responsibilities, Michael oversees the marketing, business development and communications functions at CPA.com. He works closely with key influencers across the profession, including firm associations, state CPA societies and the thought leader community. Michael is connecting regularly with firms of all sizes to discuss their strategies for leveraging technology to improve client service and achieve growth.

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