

*As founder of Upstream Academy, a consulting organization that works with more than 500 accounting firms throughout North America, Sam Allred is one of the top strategic thinkers in the profession. He energetically and creatively uses a firm's strengths to successfully navigate challenges they face. He regularly is referred to as one of the major influencers of the accounting profession and the "godfather" of leading positive change initiatives.*

**Q: What has changed the most in the accounting profession?**

**A:** I don't know that there's one single biggest change, but we're seeing a movement toward truly becoming a client's advisor and how technology is affecting that. We've been paid for decades to gather, present and prepare data, and in the not-too-distant future, technology largely will do that automatically. This will positively force us to be trusted advisors. We often use the term "trusted advisor," but quite literally only a fraction of our profession has played that role in the past three decades.

**Q: What is the "secret sauce" to create and establish champions for change?**

**A:** Expertise. A firm that can show they have expertise on their team, really understand their clients' industry and how they move the dials their clients most need to move, that's what allows firms to make the most change. It's hard for anything else to beat that. Those are the firms that will have the greatest success.

**Q: What is the marketer's role as a change agent, and how can they help accountants embrace industry changes?**

**A:** Marketers can help accountants identify opportunities. There still is a lot of need for training to identify what an opportunity looks like and what to do when you see one. Many opportunities are missed because people aren't looking for them and/or are uncertain on how to take the next steps. There is a huge need to change people's mindset on what business development is (quite literally it is helping someone - it is something good). Marketers also can help accountants embrace industry changes through the lens of a team: how do we make the team cross-functional, how do we teach accountants to share value and how do we set them up to be a true advisor?

**Q: Any tips on how to bridge the gap when it comes to embracing cultural change when you're in the "swamp of despair?"**

**A:** If we take the swamp of despair and apply it to just the

area of marketing and business development, we haven't been honest in our profession. Someone can only live in the swamp for so long – without progress – before giving up. So many people self-opt-out of business development because they feel like they're in a perpetual swamp of despair and they feel they're never going to make progress. We need to allow people to say, "Here's what makes me nervous, and I don't know what to do." There needs to be an honest dialogue with an honest plan to get somebody focused on something they can begin to do, so the swamp can be narrowed and shallowed based on what they're encouraged to individually focus on, to show some degree of success.

Progress isn't just the win alone; it's increasing your comfort zone, expanding your network and building new relationships, and dozens of other things. The marketer's role is educating the firm on what progress looks and feels like – have success early and build on it.

**Q: What are the key strategies/tactics to consider for growth and marketing in 2020?**

**A:** Trying to get more people to "opt-in" and stretch themselves. The strategy is to get everyone involved in marketing and business development regardless of their level: listen to the client's needs and figure out how to help even if their firm isn't equipped to handle it. The distinguishable competitive advantage is the "we can help you" mindset.

**Q: What is one piece of advice you can offer on leading positive change?**

**A:** Be honest with people and the swamp they're going through. We never tell people how it really is, which doesn't build trust and unity going forward.

**Q: If you could go back in time and tell your younger self one thing, what would it be?**

**A:** See all the butterflies more. All growth comes through those butterflies. We miss so much personal growth when we try to avoid things that make us feel uncomfortable. Seek out the things that make you feel uncomfortable. Those are the things that open doors to so many opportunities.



how you coordinate the people who implement your sales strategy to drive performance.

“A full pipeline is the result of prior action,” says Crosley. “If nothing has happened in the past, it’s hard to have a robust pipeline today.”

While you can’t change the past, she advises that firms keep an eye on unqualified lead activity to ensure a healthy future pipeline.

To help keep the pipeline full, Dawn Howard, regional marketing director at BKD, LLP, adds leads from CPE-driven events the firm hosts.

“If people made an effort to attend one of these events, it seems like they would be a bit of a warmer prospect that can be added,” she points out.

Davis suggests adding opportunities for existing clients. “We put together client opportunity plans that are updated four times a year, and this is a great way to more proactively see the need for a future service,” she says.

If you are looking for more leads from a specific team member, firm marketing or business development professionals can coach in some instances, advises Kuesel. “Some firms even outsource this function when they don’t have the internal expertise,” he reports.

Ultimately, though, you have to be okay with the fact that not everyone will have a significant number of leads on the pipeline. Actually, it’s quite natural. Crosley compares this to a football game that needs fans in the stands.

“If partners are not on the field,” she says, “they should be in the stadium studying the game and cheering the wins.”

### Use Data Gathered

With a pipeline in place, you have new sources of data to guide your efforts.

“Pipeline data is a leading indicator of revenue growth to gauge how

close you are tracking to goal,” Kuesel says. “It can also be helpful in staffing decisions.”

BKD uses pipeline data to track both new work and lost proposals. Howard also uses the data to lead discussions around lost work from current clients and possible fee increases.

“This helps us look more broadly at revenue growth,” she says.

The recent implementation of a CRM system at Rea allows Davis to provide dashboards for regional presidents to better dig into the data they do have. With more consistent data, she wants to use it to help in forecasting.

“We have a partner who is always pointing out that we tell our clients to do this level of analysis, and we need to do it, too,” she says. “A champion like this will help us do more with the sales data we’re compiling today.”

### Uniform Training

Sales training is imperative for firms serious about growth.

“An effective sales process is important overall, but critical when pursuing large accounts where you don’t want any missteps,” says Kuesel, who recommends setting a threshold for mandatory use of the sales process when opportunities are competitive or exceed \$25,000 in revenue.

Crosley believes everyone should attend sales training starting at the 101 level because it’s the skill set for trusted advisors.

“Half of all sales are to current clients, making this a much-needed skill,” she says, adding that training is then reinforced by coaching and mentoring.

A pipeline review call is also a great time to emphasize positive sales tactics.

“A lot of great ideas are shared on pipeline calls, and it’s one way we help reinforce what others should be doing,” Davis said.

As a result of sales training, firms should see improved performance at the individual level. “Business development is a skill that can be learned,” Kuesel said.

### Driver’s Seat to Growth

Build upon your current pipeline document to ramp up sales within your firm. As a marketing or business development professional, this falls into your purview, and your firm needs your leadership.

“Sharing leaderboards highlighting things like who has the greatest number of leads or dollars in the pipeline is a good way to put peer pressure on others,” Davis suggests.

Cultural changes do not happen overnight, but you can take small steps today that will encourage everyone to understand the role of sales in firm growth. When it comes to reviewing pipeline leads, Crosley says you have to “celebrate your wins and learn from your losses.”

The same holds true as you work to create a new and improved sales culture.

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experts, professionals with expertise in artificial intelligence, business analytics and other non-traditional services,” Erbs said. “We are seeing HR and even marketing becoming part of advisory services as well.”

Andersen CPA has embraced this trend of non-traditional professionals and has started hiring entire teams of specialized consultants rather than CPAs, including a banker to help clients with loans and banking solutions, a retired military data analytics expert, as well as an IT auditor to lead their advisory services arm.

“These are just examples of what we are doing at Andersen,” Erbs said, “but we see it happen in firm after firm.”

## Marketing’s Role

There is a universal consensus that marketers are playing an increasingly crucial role in influencing and implementing change. Firms are embracing marketing as a strategic part of the business rather than a cost, Ruszczyk said, adding that she sees

marketers becoming increasingly valuable in their firm’s growth strategies, particularly in areas such as mergers and acquisitions, HR and recruitment, where strategic communication is key.

“People are beginning to realize that good marketing is a retention strategy as well as a hiring strategy,” she said. “Because of this, firms are inviting marketing to the table early on in the planning and implementation phases of important business decisions. More firms are accepting the fact that marketers have a unique perspective of the firm that allows them to play devil’s advocate and see the industry through a different lens, and the firms utilizing their marketers are the ones that are growing faster and differentiating themselves in a much better way.”

Grissom agrees that marketers are in a unique position to view the firm as a whole. She points to the fact that buying tactics are shifting.

“Business owners and buyers are

becoming more sophisticated,” she said, “and this points to the need to understand the client more clearly, better manage the buying process and better serve relationships to ensure there are no questions when it comes to client loyalty — and marketers have a tremendous impact on all of these things.”

Similarly, Dobek sees marketers have much potential to influence.

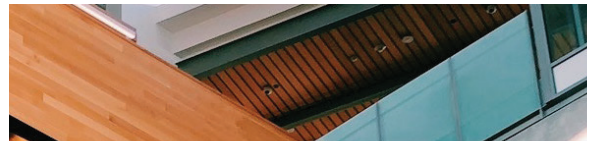
“They are in an ideal position to look at things from a broader picture,” she says.

## Her biggest advice to marketers?

“Understand the profession you work in as much as possible, just like your professionals know their niches; this is where you will influence change and where you will gain the respect of your partners.”

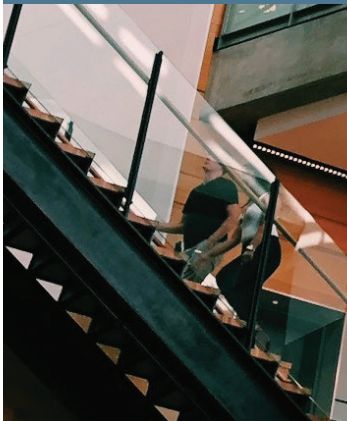
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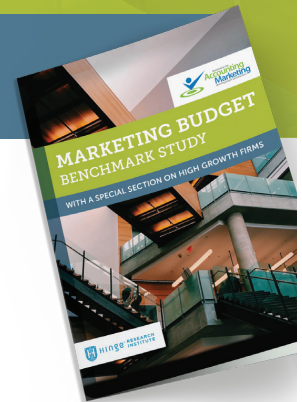
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