

A Capstone Conversation With



Jayne Bates, CPA
Assistant Director of Marketing Development and Sales
Crowe Horwath, LLP



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), President of [Capstone Marketing](#). I am delighted to be talking today with my friend, [Jayne Bates, CPA](#), Assistant Director of Marketing Development and Sales at [Crowe Horwath LLP](#). Jayne was inducted into the [Association for Accounting Marketing](#) Hall of Fame at the 2013 AAM Summit. Jayne is a CPA turned marketer. Jayne was a senior accountant at a local firm, Carter Belcourt & Atkinson. In 1995, her role changed from accountant to Director of Marketing. Carter Belcourt & Atkinson then was acquired by Crowe Horwath in 2007. So, Jayne has been a marketing CPA for quite a while. Jayne is a past president of the Association for Accounting Marketing. She has served on many committees including those related to the conference and the Education

Committee, and she's currently a member of AAM's Nominating Committee. As a CPA, Jayne is also a member of the [American Institute of CPAs](#) and the [Florida Institute of CPAs](#), and over the years, has been involved in many charitable and business organizations. Jayne, congratulations on being inducted into AAM's Hall of Fame. How does it feel?

Jayne Bates: Thank you, Jean. Oh, it is great. It was a very memorable night and I just felt so honored to be part of such a great group, such as you and all the other AAM marketers that I've looked up to all these years. So, it really was a thrill.

Jean Caragher: I know that [Neil \(Fauerbach\)](#) and I really enjoyed giving you the award. It was wonderful to see because we think it is a big deal and it was well deserved for all that you've done for the organization.

Jayne Bates: Thank you. It was so neat to be inducted with Brian Falony because I've known Brian since 1995, when I did the switch from auditor to marketing. Our firm had joined an association that Brian was the Marketing Director for and he came down and did a marketing audit of our firm. We've talked and I've gotten advice from him over the years and just this past year we were talking about grandbabies. So, it was fun to be able to share the night with Brian.

Jean Caragher: Jayne, you've got an interesting perspective, being a CPA and a marketer. What do you think is the greatest challenge in marketing CPA firms?

Jayne Bates: Over the years, working with a smaller firm and then working at Crowe with 2,600 people, we have the same issue of differentiation. It's how we differentiate



ourselves from the other firms. At Carter Belcourt & Atkinson, we tried to compare ourselves with other regional and local firms. Now at Crowe, “Okay, how do we differentiate ourselves from the Big Four and the Top 10 firms?” It’s the same issue no matter the size of the firm.

Jean Caragher: Obviously, just in a bigger world, because of the types of clients that Crowe can attract and you’re competing against larger firms, do you find that more difficult or is it the same?

Jayne Bates: I think it’s the same and, actually, at Crowe, I found with each of the services or business units that we have, each of those may have different differentiations than the other groups, like the audit may be different than the Financial Advisory Services group. We look at each of the services and determine what our differentiations are.

Jean Caragher: Interesting. What are the biggest changes that you’ve noticed in accounting marketing over the past 10 years?

Jayne Bates: I think, mainly, it’s been direct mail and print advertising. All we used to do was print advertising, Yellow Book advertising. Now, rarely, do we do print advertising and direct mail. We shifted more to e-communications and we do online advertising. The e-communication has provided a way that we can touch clients and prospects at a more reasonable cost. But it is kind of interesting because I found in the office, I get a lot less junk mail. We see that in most businesses. So every once in a while we run direct mail campaigns because we know that people are getting less so that they will be recognized more.

Jean Caragher: Interesting.. So, there’s an opening there, perhaps, for firms to consider putting some direct mail back into the mix because there’s not as much junk being delivered.

Jayne Bates: Right.

Jean Caragher: You wonder if that will swing because, obviously, the social media and all the technology and e-communication is not going away, but you wonder if it will swing back a little bit to include more print or mail.

Jayne Bates: I don’t know. That will be interesting to see.

Jean Caragher: Yes, we’re going to have to watch that and see if that changes. What is your prediction for accounting marketing for the next five years? We’ve seen more e-communication and, as you say, less print ads and less direct mail. What do you see going forward into the future?



Jayne Bates: I think we'll see more of that technology, and that's where we're going to have to adapt. That's where we're going to have to rely on consultant specialists, like you, who specialize in new technology so that we can learn from people, like you, and other specialists in technology because, right now, there's so much going on to learn about. It's somewhat overwhelming, I think.

Jean Caragher: I agree. It can be overwhelming. Thank you for the plug. For everyone listening, I didn't pay Jayne for the plug... What is the reaction of your firm's partners and managers with all the e-communication and social media? What are their thoughts about that?

Jayne Bates: I think they love it. The challenge is, our firm, we have to schedule out our e-communications because we don't want our clients and prospects overloaded. So, it's kind of interesting. Sometimes we have to schedule out a month in advance, which e-communications is supposed to be quick, but we have to do that because we just don't want them overwhelmed with all our information that we're providing.

Jean Caragher: Right.

Jayne Bates: And partners don't really seem to understand that. Of course, you have to explain to them if they want to do e-communication right away, you have to tell them, "Okay, we're scheduling these out to keep from overwhelming."

Jean Caragher: But, I'm sure when hot things come up, those get out more quickly.

Jayne Bates: Definitely, yes. Yes, we can.

Jean Caragher: That's the beauty of being able to send communication quick.

Jayne Bates: Right. We can do that. It's just the everyday email that we do have to schedule out.

Jean Caragher: Yes, because that would be similar to getting lots of junk mail. You don't want to be sending a lot of emails that your clients are going to ignore.

Jayne Bates: Right, definitely.

Jean Caragher: What factors do you think enable accounting marketers to be successful?

Jayne Bates: I think we need to be good listeners and communicators. We have to find out what our partners want through listening, evaluate what they want or need, and then give them recommendations as to what will work the best. All of those steps are



important because they won't buy the recommendations that we provide if that's not what they ask for.

Jean Caragher: They need to feel a need or urgency, if you will.

Jayne Bates: Right.

Jean Caragher: Perhaps, marketers could be communicating that urgency of why a specific campaign or initiative should be implemented.

Jayne Bates: Exactly.

Jean Caragher: Which of your personal skills have contributed most to your success?

Jayne Bates: That's a very good question. It takes many personal skills, and I think patience and persistence have helped me. Actually, I remember one partner who the first call I had with him, he complained about the billing system. You name it, he didn't like it. He didn't want to do anything marketing and now he was evolved to our regular marketing campaigns, e-mailings, advertising, webinars. It's been really rewarding to see the change, that he sees value in what I do and what marketing does. That's been fun to see. Also, I think another personal skill is being positive or, maybe, the appearance of being positive. I do try to be positive about everything, so I think that helps. People want somebody positive to be around, and I try and do my best. All my conversations, especially since most of my work is done over the phone, so you have to show the positive-ness in your voice. I think that has helped. Also, I think, too, my background as an auditor and CPA has helped because I understand what most of them, especially the auditors and the tax people, what they're going through and what they have done. I also keep up my CPA license so I understand, somewhat, the language.

Jean Caragher: I'm sure that being a CPA is bringing the credibility along with that, of having that designation that you truly understand the business.

Jayne Bates: It really does. In the first meeting, I try and share that I am a CPA. I think that it does help.

Jean Caragher: I've talked to many people about the need for marketers to truly understand how their firm works and the services the firm provides, not just in a bulleted list, but what those services actually are and how their firm makes money. Kind of like an Accounting 101 for their own firm.

Jayne Bates: I think it does help. I've had a little bit of a challenge because I do work with some services that aren't the ordinary CPA firm and I don't feel as comfortable because I don't quite understand those services like I would an audit or tax. So, I think it is important to learn about the accounting firm business. Especially, for a new



accounting marketer is to find out, “Okay, what are those deadlines?” so that we’re not requesting, “Okay, I need some thought leadership on April 10th” and it takes somebody to respond. That’s a good way to end a career early in accounting marketing.

Jean Caragher: Exactly. You don’t want to be asking much in April.

Jayne Bates: Right.

Jean Caragher: You mentioned earlier about a partner that transformed, if you will, from someone not interested in marketing to really being highly involved in that. How did that happen?

Jayne Bates: I think it’s just persistence, just working...

Jean Caragher: Did you wear him down?

Jayne Bates: I think I did or maybe we both wore each other down. I think just showing how I can help him bring in the business and get his name out. I think, mainly, it was just showing, we send out these mailers that shows awareness of him and his business. Just be there and talk and find out the needs and find out what are your issues. I think it just takes patience, communication, and listening too.

Jean Caragher: And a desire to help them be successful.

Jayne Bates: Right. The partners, they need help with marketing. Some of them think that they understand it. They do understand the business, they understand the client, so it’s just sharing our expertise; theirs with ours.

Jean Caragher: What would be your best piece of advice for accounting marketers?

Jayne Bates: I think, like you mentioned, it is to learn the accounting firm business and find out deadlines. If the firm has any internal continuing professional educational courses, I think that would be great to attend if you can. Learn the buzz words, learn what the professionals are doing. Also, attending those events is a good time to learn the hot topics and also learning to network, networking with them during the continuing education. Also, I cannot neglect for accounting marketers to get involved with AAM. When I first converted from a senior auditor to marketing, that was 18 years ago, I had taken one marketing course when I was getting my masters in tax, which is kind of odd. The first thing I did was to join AAM and start attending the conferences. I’ll never forget all of the people I met at the first conference. I collected names and business cards, and over the years, have received all kinds of advice: advertising, email, newsletters, and presentations. Everybody is so willing to share information and it’s been such a great organization, so I feel like I have friends all over the country and even friends in Canada. It’s just been great. If I have a question about a vendor, because we



get email selling different kinds of services and if we don't know about this organization, I can reach out to someone at AAM and find out if somebody else has heard of them. So, AAM is a great organization.

Jean Caragher: I agree with everything you said about AAM because not every organization has members that really are willing to share their thoughts or information and AAM members absolutely are willing to do that. Jayne, what would be your best piece of advice for managing partners?

Jayne Bates: I think that managing partners, along with their leadership team, should share their goals for the future, then provide support for either the strong marketer or marketing team to help the firm get there. Just offer the support to marketing and let us help the firm get to where they want to go. So, I think we just need direction. Fortunately, some managing partners have marketing people in their leadership team, so I think that really helps, too, for additional support.

Jean Caragher: Yes, our profession has evolved over these decades.

Jayne Bates: Right.

Jean Caragher: Firms have been allowed to market and promote themselves, and it's wonderful to see that it has progressed in that way.

Jayne Bates: Right.

Jean Caragher: We've been talking today with Jayne Bates, CPA, who was inducted into the Association for Accounting Marketing Hall of Fame. Jayne, thanks for your time today.

Jayne Bates: Thank you, Jean. It was a true honor to be interviewed by you.



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