

# A Capstone Conversation With Julie Tucek



Julie Tucek  
Marketing Director  
Legacy Professionals LLP



CAPSTONE MARKETING

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Welcome! This is [Jean Caragher](#), President of [Capstone Marketing](#). Each year the [Association for Accounting Marketing](#) Board of Directors selects a Hall of Fame recipient based on dedication to, and promotion of, the discipline of accounting marketing and the accounting profession as a whole. I am excited to be talking today with friend [Julie Tucek](#), the Marketing Director for [Legacy Professionals LLP](#) and the most recent inductee into the [AAM](#) Hall of Fame.

At Legacy, Julie is responsible for managing all aspects of the firm's marketing and business development efforts. She works with her partners and managers to strategize on new business opportunities and works closely with them to generate and close new business. She also provides marketing training and coaching at all levels in the firm. Julie served two terms on the [AAM](#) Board of Directors from 2001 to 2004 and 2008 to 2011. Julie served as [AAM](#)'s President in 2010. She's a contributing author to *Bulls Eye! The Ultimate How-To Marketing and Sales Guide for CPAs*. She is also very active in the Chicago community, including the Association Forum of Chicagoland, Irish Fellowship Club of Chicago, Saint Mary's Alumni Club of Chicago, and the Union League Club of Chicago.

**Jean Caragher:** Julie, congratulations on being selected as the newest member of the [AAM](#) Hall of Fame. How does it feel?

**Julie Tucek:** Thank you, Jean. It was so exciting! I was completely shocked. In fact, I was misbehaving a little bit and not paying attention. One of my friends came up to me and said, "Could you start listening?" and when they started talking about me and called my name I was truly shocked. Mostly stunned because of my colleagues that are in the [AAM](#) Hall of Fame, I just couldn't believe I was being named with them. I was really, really honored.

**Jean Caragher:** I was so sorry to miss it. As you know, that was only the second [AAM](#) Conference in its history that I have missed. I was so disappointed and thrilled for you at the same time because it is very well deserved.

**Julie Tucek:** Thank you and we missed you very much.

**Jean Caragher:** Julie, when you think about the time that you have spent in the accounting marketing profession, what do you think is the greatest challenge in marketing CPA firms?



**Julie Tucek:** Differentiation, which has always been present and continues to be a challenge. I don't think that it is going to change anytime soon. It is also challenging as you work at your firm to try and get a hold of understanding and having a view from the outside, which is difficult when you are on the inside. This is one of the reasons for CPA marketers to really know the firm's clients; they can really stay connected from both the inside and the outside.

It is a continued challenge to adjust to meet the strategic goals as they change. Also, to make sure you are not doing something just because you did it last year. Really and truly looking at the old and the new and continue to make sure it makes sense for your firm.

**Jean Caragher:** You made a great point about not repeating something because you have done it, so you are not taking out your plan and just copying it and changing the year on it.

**Julie Tucek:** I think for those of us that have been around the block in the industry and at a firm for a while you know that's extremely important. While it's important to maintain the continuity, you've got to make sure you are not sitting around doing what you did. You need to change and grow with the firm.

**Jean Caragher:** You mentioned it's important for marketers to know the clients of the firm. How would suggest they go about doing that?

**Julie Tucek:** For me, that's always been part of my role here. I am at a 22- partner firm with three offices and about 150 people. The size of my firm allows me to make that part of who I am and what I do here. I go to a lot of the events with the partners and the managers. I am at the trade shows where the clients are and at different events and parties. I make it my business to make sure I know our top clients. I was just at an event last week and I said to one of the partners, "Alright, walk me around. I don't know that guy," and I made sure that he introduced me to him. We were shocked that we didn't know each other because I have been at my firm for 17 years and I had not met one of the clients that I wanted to know. I certainly knew his name and he knew my name but it was important for me to put a name with a face.

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

**Julie Tucek:** The biggest thing, if you give me the ten year time frame, is really how solid of a profession that this has become. It really is an awesome place to be if this is the kind of person you are and the kind of people you like to work with. I think [AAM](#)'s partnership with the [AICPA](#) over the last five years has really put a spotlight on the profession. The CPAs themselves can see if they didn't already know how important the marketers can be to their firm. Many of us who have been involved with our firm for a



long time really can see the changes with a lot more marketing directors becoming partners or principals and having their firms lock them in as part of the team. Some of us have been at our firm for a long time now and we are all really enjoying what we do. I think that's really different from when I joined the profession 18-19 years ago because that really wasn't the case. But now if you look around at the [AAM](#) Conference, there are a whole lot of us, Jean, including the two of us that have been doing this for quite a while and are still having a great time doing it.

**Jean Caragher:** It certainly helps with the retention of marketers in firms. We both know that used to be about 11 or 12 months. Now we have many examples of marketers that have been with their firm for years.

**Julie Tucek:** If you make it part of your program and part of what you do for your firm to be part of the strategy and the true growth of your firm, your value is shown. There are so many more marketers doing that and then some. I have a colleague who deals with the mergers; he's the one out there looking for activity with his partners. That's not something I am involved in but that is certainly high level from what some of our colleagues are doing now.

**Jean Caragher:** Absolutely. What are the factors or the skills that enable accounting marketers to be successful?

**Julie Tucek:** Some of that is going to be personality, the ability to truly enjoy working with different types of people is imperative to a marketer's success. For me, at my firm, I think diplomacy and trustworthiness is huge. I am trusted to know things and to keep them to myself. The diplomacy and being business savvy are something that you really need to understand working at a CPA firm; more specifically, at a partnership. I have 22 partners so I need to understand how to work with all of them and how they want to work with me. It is also really important for the marketer to convey to those partners and to the people at the firm that their role is to help grow the firm. I am here to help you grow your firm. I think once everyone is on board with understanding that, and if you act in those ways, you will be more successful for sure. It is really important for the marketer to understand the business of the firm. You can say it over and over; a marketer needs to understand the acceptable realization rate, clients in the firm's sweet spot, the firm's long term clients, the leaders there, the next people there, and the D clients and what is being done to bring them to a different level or outsource them. You really need to make it your business to truly understand how the firm is run and how the firm is going to succeed, make yourself a part of it and help out in the ways that make sense for you.

**Jean Caragher:** Those are all good points. At the same time the marketer needs a partner group that is willing to embrace that marketer and share that information, enable the marketer to be successful or part of that strategic group.



**Julie Tucek:** Right, that's the trick.

**Jean Caragher:** That is the trick and doesn't always happen but we have many examples of success in that area. Which of your personal skills contributes to your personal success and your success at Legacy?

**Julie Tucek:** Probably my ability to truly enjoy working with the people I work with and my ability to move from one thing to the next quickly and enjoy that. It's a strange bird that really digs into accounting marketing. You need to be able to go from one thing to the next and always keep in mind the strategy of the firm and that everything I do is making sense, adding value and moving my firm in the right direction. I come to work every day thinking everything I work on needs to be part of who we are and what we are doing. I deal a lot in the new business opportunities; I spend a lot of time on the phone with prospects, talking to them about why we might not be the best fit for them and giving out names of other firms that would be. I spend a lot of time studying each and every prospect; a lot of those don't go to the partner group anymore. I used to run that by my managing partner who I work closely with on all new business opportunities. However, I spend a lot of time now doing that by myself and making sure that any opportunities I bring to the partner group are in terms of something that we are either going to bid on or meet with. It makes sense for our firm. You need to have a super clear vision of your ideal client - does it fit our firm and will it move us ahead. Those are the things I really dig into and enjoy that have worked very well for me here at Legacy with the people I work with.

**Jean Caragher:** How long were you at your firm before you felt you had the ability to evaluate those prospective clients without the managing partner input or approval?

**Julie Tucek:** That's a really good question. He and I meet weekly or every other week to talk about things that are happening. I have been here 17 years, which is unbelievable even when I say it. For the first four to six years, I would bring him everything and I would say "I recommend we not bid this" and then I would take care of that. Then over the last four to six years, we both know what we are looking for and he knows that I know to bid it or not. Every once in a while it will come back and he will ask if we got the bid and I will say, "We didn't pursue it because of this, this, and this". There are very few cases where we haven't been on the same page. It's more the prospect is not on the same page as us. Where we have not bid it to the prospect and they have come back and said, "Well, actually, we really want to hire you." I always like when I put that folder away. We will go back and say if you really want to hire us you will have to pass this and they will say okay fine.

That's been more of the case than me not being on the same page as the partners. We spend a lot of time figuring out who the best client is for us. We are not trying to grow our business with just any client.



**Jean Caragher:** Legacy is a very niched firm so there are certain advantages to that, would you agree?

**Julie Tucek:** I would absolutely agree. The advantage is, it's a market that I know our clients and I've learned it over the years. I am very specific about what kind of clients we want, the size they are, sometimes even where they are, and on and on.

**Jean Caragher:** What you are talking about is absolutely relevant and transferable to firms that have multiple niches.

**Julie Tucek:** Absolutely. It really speaks to every firm because even if you have 50 partners and 30 niches you still have a sweet spot for every niche and every type of client you want. We learned from one our bigger firms here in Chicago that they had a threshold, a dollar value audit threshold. We know a lot of our colleagues; we will pass those notes back and forth. I will know if something is too big for us or too small for us and I will pass it around and they do the same for us. So, over the years we have been able to develop a threshold in size and fee. I am able to communicate all of those things to prospects. We can have a conversation and understand if we are even going to be a good fit just from the get go.

**Jean Caragher:** That's wonderful. What's your prediction for accounting marketing for the next five years?

**Julie Tucek:** Bigger and better! If people find the right firm and they are working with the right people, it's such a great profession. Professional services marketing, they need to be teaching it more in schools. When I came out of college, if I didn't get a job at Leo Burnett, where was I going to work? Working in a law firm, CPA firm or architectural firm, these are all great industries to get into. I think it is just going to be more and more. I think the [AICPA](#) and [AAM](#) partnership is going to continue and we're going to see more partners invited to the table, if not literally, then figuratively. That's going to help them really benefit their firms.

**Jean Caragher:** What do you think of the whole social media aspect, do you see that continuing to be more relevant or used in the accounting space?

**Julie Tucek:** It's been really fun to watch. My firm is certainly involved. We are never going to be a leader in that market because of our niche markets. So, I keep an eye on that. We certainly use it for recruiting, which is valuable. It is really funny, Jean, because we have a Facebook, LinkedIn and Twitter link on our website. We are using it lightly; we are certainly not out front. But I meet with every single new hire that starts at Legacy as part of our orientation program and every time I ask if they checked us out on Facebook. They look at me like, what? Why would they do that? That's why I reel it in and don't jump so far in on anyone doing that. It's going to come, when they Google you and they see all that, there is an impression of you and your firm. If that is the



impression that you want to have, then I think it's good. These firms are really using it somewhat cautiously, but also in terms of just how their firm's image is, what makes sense for them. I think as CPA firm marketers we need to be smart about why we are doing this. Is it just because other industries are doing it? Are we doing it because it makes sense for our firm? That's what I try to do. Because my firm is a niche firm; what's great for someone else's firm is not going to be right for my firm. It has taken me a long time to get there. I can't go into my managing partner's office jumping up and down about something some other firms are doing. When it's like, "Julie, who is our market and you know who our competitors are." I think for everybody that's just really important and that's how you add value is to understand that.

**Jean Caragher:** What is your best piece of advice for accounting marketers?

**Julie Tucek:** Wow, learn the business, understand the business, talk to your partners and understand what they want from you and what they are hoping to get from you. On the flip side, you said it earlier, that some of the things I do here people want to do at their firms. Part of that is them communicating, "Hey, I think this might help me help you." That's really how I have always looked at my job. If you really take the time to understand the industry and be patient, I think that's one of the biggest things. It's not like you're going to work for Kraft and you are going to jump off a new branding thing and it is all going to take off in six months' time. Things are a bit slower and rightly so, it's a partnership and you have to understand who it is you are working for and with.

The other thing is be involved in [AAM](#) or your international association or both. I have learned so much from my colleagues in the industry over the years. I hope I have been able to teach them half as much as I have learned from them because it's such a great industry for getting help and getting feedback from your colleagues. I very rarely take a big step without checking in with some of my longest [AAM](#) buddies to say, "Hey, what do you think of this?" or "Who has done this?" and they do that for me, as well. I am always happy to help. Something to really understand is how much help you can actually get to help your firm.

**Jean Caragher:** I think that is one of the best qualities about [AAM](#), the fact that so many people are willing to give you resources, information, personal experiences and really honest feedback on what you are trying to do.

**Julie Tucek:** Right, even documents, because we all know that you could take the right proposal and it is not going to mean anything if you don't put the right people behind it or whatever. There's very little lack of sharing in [AAM](#). I have always been able to get at least examples from some of my buddies and that has really helped me help my firm.

**Jean Caragher:** Wonderful. On the flip side, what is your best piece of advice for managing partners?





**Julie Tucek:** I was obviously very lucky when I joined my firm because I had a great relationship with my partner. You want to hire someone that you really like and trust and enjoy being around because that's what it should be, right? You want to work together to grow the firm; you need to make sure that it's a person you want to bring out and that you think the clients are going to like.

The other thing is play with others strong suits. I always say CPA marketing directors are involved in 20 parts of marketing and business development and they might be really good at eight or 10 of them. Outsource a few other ones. What is it about our partnership that can help our firm? At my firm the managing partner has always been our top sales person along with some other partners that do a lot of the sales. I feel like the marketing director should be right there with the marketing manager and the top sales role. If they are doing marketing it is also marketing and BD in terms of just selling the firm. If you can develop a true partnership with your marketing director, that is going to help everyone at the firm.

**Jean Caragher:** Before we end I have one more question for you, more on the personal side. For those of you who are not aware, Julie competes in triathlons and is a woman in shape. What is your most rewarding triathlon experience?

**Julie Tucek:** Actually this summer, I'm sad to report, after 10 or 12 years in a row of triathlons, I did a half marathon instead because my biker buddies and I just couldn't find the time to do the long bike rides. We will be back on the tri-circuit next summer. The Olympic triathlons that I have done with my friends and that I trained with, when we finish, take the picture and we are feeling awesome and it is a beautiful day, I think that's the biggest thing. For me it is really more about the camaraderie with my training buddies. As a working mom, I had to give up more social things to keep work and family balanced. The training is kind of my social, being with those buddies and that's been really awesome for me.

**Jean Caragher:** We've been talking today with [Julie Tucek](#) the Marketing Director for [Legacy Professionals LLP](#), the most recent inductee into the [AAM](#) Hall of Fame. Julie, congratulations again.

**Julie Tucek:** Thanks, Jean.

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