

A Capstone Conversation With The 2012 Rookie of the Year



Kari Reynolds
Marketing Specialist
Macias Gini & O'Connell LLP



CAPSTONE MARKETING

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Hello and welcome. This is [Jean Caragher](#), President of [Capstone Marketing](#). I'm delighted to be talking today with [Kari Reynolds](#), who was named the 2012 [Rookie of the Year](#) by the [Association for Accounting Marketing](#).

Kari is a marketing and design professional with more than five years of experience working in diverse industries including real estate, construction, nonprofit, pharmaceuticals and professional services.

In 2010, she joined [Macias Gini & O'Connell LLP](#), also known as MGO, a certified public accounting, consulting and business management firm with seven locations in California and Washington. Kari is the firm's lead graphic designer and is responsible for extending MGO's award winning Proud to be Boring Accountants platform into campaigns, as well as leading design and campaign efforts for the firm's subsidiary brand IntelliBridge Partners. Kari is the go-to person in Southern California for staff development and mentoring in the areas of networking and building relationships, as well as training administrative staff in proposal tools and best practices. She cheerfully wears additional hats: public relations coordinator, database manager, project liaison, vendor relationship guru, branding cop, copywriter, social media campaign manager, event coordinator, firm newsletter producer and website developer.

In addition to being passionate about marketing and design, Kari is an active member in the community. She participates with nonprofit, future leaders of our community and serves as a volunteer instructor with Boys Hope Girls Hope in Orange County. In her spare time, Kari prides herself on being a foodie, musicphile and avid day-trip traveler. Kari, congratulations on being named the 2012 Rookie of the Year.

Kari Reynolds: Thank you so much.

Jean Caragher: In your brief time in accounting marketing, what do you find is the greatest challenge in marketing CPA firms?

Kari Reynolds: The greatest challenge we have is getting the buy-in of the decision makers or our partner groups because marketing is such a new part of accounting. Sometimes it's hard to get them to understand a lot of the strategies and concepts that we bring to the table as marketers.

Jean Caragher: How do you do that? How do you gain the buy-in from your partners?



Kari Reynolds: First of all, you have to understand that our potential clients are not buying a tangible product. So understanding the services and then presenting that to the partner group so that they understand that we are going to allow the client or the potential customer to feel really comfortable with the services that we're offering. Financial services are a very specific type of thing, so when we can get the client or the customer to feel safe, the partner then feels safe and then can buy-in to the concept of marketing and the communication that we're putting out there.

Jean Caragher: It sounds like you're trying to get the partners to put themselves in the shoes of their clients?

Kari Reynolds: Exactly, which a lot of times they are very hesitant to communicate to clients just because "finances" and "money" is a very touchy thing. We want the partners to really understand that it's okay to communicate to the client and to have them understand who we are as a firm and as a brand.

Jean Caragher: Right, and this [Proud to be Boring Accountants](#) is a brand positioning that took some guts.

Kari Reynolds: It definitely did and it was really risky. We, from the initial get-go, definitely had some people who were very hesitant about it and then eventually they started to warm up, but the results have been great because we've gotten noticed.

Jean Caragher: So it's helped you stand out in the community. Wonderful. Kari, tell me, both personally and in general, what factors or skills do you feel enable accounting marketers to be successful?

Kari Reynolds: Creativity, to be honest. You can't take any situation and necessarily say that there's going to be only one strategy behind being successful. If you can be creative with the way that you approach problems, your solutions are going to be a lot more successful. For instance, with our brand, it made us very successful initially. Then, what we can do now with the brand is take that and use it in a bunch of different communication channels, including direct mail, online, and all these different ways that we are touching our clients and our potential clients. Having a strong brand really can make you successful in all those other areas.

Jean Caragher: That, of course, has been a hot button lately because in my experience when CPAs hear the word "brand" there's a genuine misunderstanding about what that means. They automatically jump to hundred thousand dollar ad campaigns and that's not what it is.

Kari Reynolds: It's definitely a fear trigger for a lot of accounting firms just because accounting marketing hasn't been established for very long. So it is scary for them to



feel like they have to have a brand that is a little bit more risky or something that's changed that they can be fearful of.

Jean Caragher: Which of your personal skills contributes most to your being successful within MGO?

Kari Reynolds: First and foremost, I keep myself up-to-date on a lot of the digital media, search engine optimization, and web stuff because so much of what we do is online now, and that includes social media such as LinkedIn, Facebook, and Twitter. Keeping up-to-date on that stuff helps you to understand what's new and coming up in the industry. Also, because I do a lot of design work for the firm, my most invaluable knowledge is my knowledge of design programs. Adobe Creative Suites is probably the most invaluable thing that I've basically educated myself on and it's helped me to be the in-house graphic designer for MGO.

Jean Caragher: How many people do you have on your marketing team?

Kari Reynolds: We have a very small marketing team. I have a Director of Marketing and then another counterpart who is a Business Development Coordinator.

Jean Caragher: I can imagine between the three of you, you're very busy.

Kari Reynolds: We are very busy, especially when we're working with over 200 professionals.

Jean Caragher: Right, and over seven locations. That just adds a whole other element to it when you're all not in one place.

Kari Reynolds: Yeah.

Jean Caragher: Kari, here you are the Rookie of the Year - you've got some experience, you've been in the accounting industry a couple of years. What's your best piece of advice for other accounting marketers?

Kari Reynolds: One of the challenges that we have is not having a budget. So my best piece of advice is looking for other ways, when you don't have the budget, to get the job done. There are definitely, with the advent of social media and online channels, creative alternatives that can really work to the firm's benefit to engage leads. Then also, staying up-to-date on current marketing trends in other industries is really helpful because a lot of times they are little bit more forward thinking in their strategies and their processes. Educating or self-educating in those areas can be really helpful.

Jean Caragher: Do you have any specific go-to resources that you would share with our listeners?



Kari Reynolds: For search engine optimization, I use a website called www.SEOmoz.org/blog, which is a great resource because they have people from all different industries that gather information and they post that on their site. Other than that, I read a lot of articles, search the web, and look for things that kind of come up. For instance, if I'm looking for something in particular, I'll just Google it and find information or blogs that relate to that. With the understanding that not everybody is giving 100% correct information, you have to be a little cautious. However, going ahead and just Googling it really helps. Then, you find all sorts of information. A lot of the stuff that I do look up is very technical because I try to educate myself through the web HTML and that kind of stuff.

Jean Caragher: Google has changed our world, hasn't it?

Kari Reynolds: It has.

Jean Caragher: In turn, what is your best piece of advice for managing partners?

Kari Reynolds: Change is scary, but if they trust their marketing team, change can be really great, especially since there are so many possibilities in accounting marketing - things that have not been done. I would challenge them to be more bold and risky with their marketing strategies and not to be afraid of client communication.

Jean Caragher: I understand that you've been in our industry just a couple of years and that's why the award was Rookie of the Year, but with that said, what is your prediction for accounting marketing for the next five years?

Kari Reynolds: For the next five years, we are definitely going to have more of an online presence, in that, we are trying to be more of "thought leaders" - connecting with potential clients and engaging not only the clients but also people that we're recruiting through these online channels, including social media. That's going to happen a lot more and people are going to become a lot more comfortable with that. So it's not going to necessarily be just this referral base of gaining clients, but also this online presence of gaining confidence of clients through branding strategies and touches with these potential clients or anybody who is interested in having financial service help.

Jean Caragher: That's an interesting change that's occurring because I remember at an AAM conference years ago, someone mentioned getting statistics off of their website and optimizing websites and you could hear this hush in the room. There was a big hush, and of course, now we've totally passed that, like 100 years ago, with all of these online tools that could be used. It just has changed so quickly.



Kari Reynolds: Even a lot of the seminars at AAM this year were very focused on digital and online presence, and they were very well attended, which is great because it's most important for people to understand that right now.

Jean Caragher: You shared with us a couple of your out-of-work hobbies so let me ask you a few questions. What's your favorite food?

Kari Reynolds: Probably Mexican. It's because I've grown up in Southern California all of my life and we definitely have a large selection of Mexican foods.

Jean Caragher: What's your favorite musical group?

Kari Reynolds: That's a really hard question because it changes constantly, but I did go through this phase where I was really interested in a lot of older music. So now, let's see, who it would be? Well, Steve Miller Band. He is the one that I am listening to a lot lately. So Steve Miller Band is probably one that I always go back to a lot.

Jean Caragher: I am of the generation when Steve Miller Band was popular, when it wasn't considered old. And, you probably know what the next one is. What has been your best day-trip ever?

Kari Reynolds: My best daytrip ever - probably going down to Temecula and doing a little bit of wine tasting with friends over my birthday. I turned 30 this year, and we took a trip down there; it was a great adventure. We had a great time.

Jean Caragher: Now that I am in San Diego, I have to put that on my list of things to do.

Kari Reynolds: It's a great place. I love San Diego.

Jean Caragher: Kari, thank you so much for your time today. Congratulations again on being named Rookie of the Year. It's very well deserved.

Kari Reynolds: Thank you so much.

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