

# A Capstone Conversation With Katie Butler



Marketing Coordinator  
Weinstein Spira



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), President of [Capstone Marketing](#). I am delighted to be talking today with [Katie Butler](#), Marketing Coordinator at [Weinstein Spira](#) in Houston, Texas and a [2016 Association for Accounting Marketing Rookie of the Year](#). Katie joined Weinstein Spira in April 2014. She is responsible for the firm's marketing plan and strategy, maintaining the firm's website and social media presence, producing newsletters, press releases, promotional and branding material and managing the work of outside vendors.

Congratulations, Katie and welcome to the Capstone Conversation!

**Katie:** Thank you so much. It's been a great honor. I've been receiving so much love and kind words from everyone within and outside the industry since we've been in New Orleans. It's been a great time so far.

**Jean:** Wonderful, I am glad about that. Now, I know you haven't been in the industry that long, that's why you are a rookie. Tell us, what is the greatest challenge you've found so far in marketing CPA firms?

**Katie:** I think the greatest challenge is getting a seat at the table and being seen as a strategic partner. We all know that we're strategic, smart and intelligent, and conveying that to our firms and being involved in the planning and decisions. For example, having a seat at a partner retreat or being brought on when attending a networking event or getting involved in individual strategy. And being top of mind with our clients, which are really all of the accountants.

**Jean:** I have heard about that challenge from every level, not just rookies, even those with many years of experience. We need to be really focused and diligent about what we're contributing and being able to communicate that. So, given this challenge of getting a seat at the table, what is your prediction for accounting marketing for the next five years?

**Katie:** I'm so excited for the next five years. I've been reflecting on New Orleans and all of the great content that we got out of that. What's the direction that we're heading? I think there is going to be a creative revolution in accounting firms. We heard a lot about differentiating yourself from the typical "we provide great service." We need to look outside of our industry at marketers in other industries to see what they're doing and get inspiration from that. Getting inspiration from different sources that we've probably



never thought of to create a different look, feel and experience for our future clients.

**Jean:** While accounting is certainly different from a lot of other industries, there are things we can learn from other industries. When you look at companies like Nike or Coca Cola, we can make a long list, and we can certainly adopt.

**Katie:** Yes, I would encourage people to subscribe to different feeds on Twitter or LinkedIn, to get different viewpoints and expand your knowledge and open your mind to different things.

**Jean:** What factors or skills enable accounting marketers to be successful? I know you are developing your network, do you see people in your network with similar skills that make them successful?

**Katie:** Yes, there are two. I think the first one is celebrating your wins always, whether it's big or small. Celebrate your win, celebrate your firm's win and celebrate other people's wins. Recognize everyone, whether it's an action, "I got a meeting with so and so," or it's a result, "I brought in a new client." Celebrate and support that with why that's important. If you got a retweet from a new publication, that's huge, but maybe to an accountant it's not a big deal. Celebrate all those wins and support that with data.

The second thing is to have a thick skin. As a first-time marketer you have to prove your work. You hear, "Why do we need marketing? We've been in business for over 50 years and why do we need a marketer? Are you an admin function?" No, this is what I do and this is why. You will get told no, but definitely keep your chin up, be gracious about it and just keep going.

**Jean:** Yes, I think the accounting marketing profession has come a long way but there is still a need for marketers to have that thick skin and not take everything personally because we are so different from accountants, right?

**Katie:** Yes, we think differently. I'm a visual person. I don't think of numbers all the time but our accountants do, so adjusting to those things that they like to see and proving your point to them.

**Jean:** Let me go back for a minute. You talked about celebrating wins and supporting those wins with data. How do you do that at Weinstein Spira?

**Katie:** We do a ton of celebrating and I love recognizing other people. We have a lot of programs. We just hosted our Second Annual Marketing Contest this year. We divide up into teams and do different competitive tasks and get recognized during that time, whether it's for getting 10 connections on LinkedIn or writing a thank you note to a client. All of those count.



We also have a coaching program. Our team loves it. You have that “go to” person and mentor within the firm that will be your cheerleader all the way. We have a fun brigade and free goodies. I celebrate every time we get new swag, “We got sticky notes, and it’s awesome.” Let’s be excited about that or excited that we got retweeted. Then support ‘why’, “Oh my gosh, we got new sticky notes and why did we get them?” You get them, our clients get them, we give them to the staff and celebrate the ‘why’ too.

**Jean:** I know part of the reason you were acknowledged as being Rookie of the Year is a business development initiative you were involved with within your firm. Can you tell us about that?

**Katie:** We worked on a full-year program and called it, the “Sky is the Limit”. We did firm-wide business development meetings where we told people what was in our pipeline. It’s not a secret. Not just our management knows it; everyone knows what’s going on. We held training on networking, how to convey the brand, how to write a thank you note, how to address a thank you note. One of our trainings was about how we don’t want our people to be afraid of the “S” word, which is sales. We held bi-weekly management team meetings and did our firm contest I just talked about.

One of my favorite things we did this year was set a firm goal for new revenue and we tracked it publicly. We gave monthly updates in our Friday class. We had a thermometer in our mail room and every time we got new business it went up. It’s been great to recognize like that, to make it public. We wanted everyone from staff level to shareholder to be in the know, to make it a team goal and team environment, just like everything else in our firm. We wanted to make sure that’s ingrained in our culture.

**Jean:** Did you achieve your goal?

**Katie:** We are still working on our goal. Our fiscal year ends June 30th, so we’ll see, but we are within inches. We are so close!

**Jean:** Excellent, and I’m sure that goes a long way to building that marketing culture within Weinstein Spira.

**Katie:** Absolutely. From my first day here at Weinstein Spira it’s been a goal to include everyone. I’ve heard that at some firms you are thrown into management and then that’s when you start networking. But, what we’re doing is helping our staff level grow their network, grow their skills, so that when they do make manager they’re equipped and it’s not like, “Oh my gosh, I have to do all this stuff that I have no idea how to do.”

**Jean:** Katie, which of your personal skills do you think contributes most to your success?

**Katie:** I would say I am a very enthusiastic person, and I wear the Weinstein Spira brand on my forehead all the time. You have a personal brand, but you’re still representing



Weinstein Spira. I just do everything with enthusiasm. I want to exceed expectations. If someone needs something within an hour, I'm going to drop everything. I'm going to do what I need to do because we need to be enthusiastic and ready to go at all times. One of our co-workers actually called me "the bling of accounting." My office is pink and filled with pink things. I just love being enthusiastic because how can you go through your day and not be enthusiastic about what you do?

**Jean:** That's in our individual attitude, isn't it? We can choose to be enthusiastic and we can choose not to be enthusiastic.

You mentioned earlier about the challenge of getting a seat at the table. How do you think marketers can gain more power or influence within their firms?

**Katie:** I already touched on this, but celebrating everything and supporting it and why it's important and why you're celebrating it. Celebrating the actions to get there. Everyone in business knows you're not going to win every single person you meet with, but you got out there and you did it. You did something, you went to a meeting, you wrote a thank you note, you did a follow up, and that deserves a celebration in my book. You actually did something and I think always doing that and celebrating other people will get them excited like, "Oh, I didn't know that I could get celebrated for doing my job like that." That's my word of the day. I love celebrating people and recognizing people.

**Jean:** You must really love birthdays then.

**Katie:** I do. I celebrate my whole birthday week. I love it.

**Jean:** I enjoy birthdays, too. I would rather be having a birthday than not having a birthday, let's put it that way.

What is your best piece of advice for accounting marketers?

**Katie:** I love this question because I have several. First of all, find your community. Find it within AAM (Association for Accounting Marketing). Find it within your accounting alliance. Find your tribe and stick with them. Joining AAM from day two of working here has been invaluable. Being on a volunteer committee has played a big part in my knowledge. We have such a wealth of people who have already been on this path and already blazed this trail so why not use that resource?

I can ask somebody, "Hey, what do you think of this proposal?" or "Have you done this? What language do you use here?" I love our group at AAM, all of the education we receive and that we can volunteer. I just fell in love with the AAM-MAA Committee. I chaired that this past year and I'm shifting to a different role within the Summit Committee. Just find something that you love within AAM or your alliance, or anywhere.



Just find your tribe. And, as I always say, continue to be curious and push outside of the accounting silos.

Lastly, continue to promote yourself and your personal brand. Your name is always going to be attached to your accounting firm and it helps to put a face to that name to that accounting firm. You might not remember Weinstein Spira, but you'll remember Katie Butler, who was there, who spoke on this podcast. You'll remember again, well I'm not a face today, but at a networking event you're going to remember Katie Butler because I saw her face. Continue to promote yourself as an accounting marketer. I'm behind our Facebook, LinkedIn and our Twitter pages. You are communicating as a brand, but don't be afraid to get out there and promote yourself because you are always going to be tied to your brand.

**Jean:** What is your best piece of advice for managing partners?

**Katie:** This is going to sound a little crazy, but my best piece of advice is, wing it with strategy.

**Jean:** You've got to tell me more about that.

**Katie:** Trust your marketers. They know what they are doing. Know that your marketer is going to have a strategy behind anything that they present to you. You might not understand it but your marketers do. So, trust them and don't be afraid to take a risk. You might not see results, but at the end of the year we always assess if something worked or not. You can do anything for a year. Just wing it with the strategy and trust your marketer. They know what they are doing.

**Jean:** That's officially the first time anyone has used the term "wing it" on a Capstone Conversation.

**Katie:** Wing it with strategy, but don't go blindly. Definitely have a plan. If it's something way different that you've ever done, that's good because no one is doing it and go ahead and try it.

**Jean:** I think the underlying message here is don't be afraid to try new things.

**Katie:** Exactly.

**Jean:** We've been talking today with Katie Butler, Marketing Coordinator at Weinstein Spira and a 2016 Association for Accounting Marketing Rookie of the year. Katie, congratulations again.



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