

A Capstone Conversation With Laura Kucera



Principal and Chief Marketing Officer
Citrin Cooperman



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), President of [Capstone Marketing](#). I am delighted to be talking today with [Laura Kucera](#), Principal and Chief Marketing Officer at [Citrin Cooperman](#) and the [2017 Marketer of the Year](#), an award sponsored by [Inside Public Accounting](#).

Laura joined Citrin Cooperman in January 2015 and manages a team of 15 marketing and business development professionals.

She is involved with most strategic initiatives in the firm, from mergers to service line restructuring, to staff mentoring, and infrastructure upgrades. Her achievements include leading integration efforts for two new firms, developing marketing and business development strategies for those new domestic markets, and launching a global go-to marketing plan, creating a new technology and risk advisory consulting practice, developing and teaching a four-hour cross-selling class, and creating a new brand identity, Focus on What Counts. And, did I mention Citrin Cooperman achieved 17% growth last year?

Laura, congratulations on being named the 2017 Marketer of the Year.

Laura: Thank you, Jean, and thank you for that lengthy introduction. It explains why I'm a little busy.

Jean: You've been with Citrin Cooperman since January 2015, but you have over 15 years at least in accounting marketing, at big firms, too, like Grant Thornton and Friedman, so you have a history in this industry. Tell us what you feel is the greatest challenge in marketing CPA firms.

Laura: Yes, I have been a long-time marketer for professional services in the accounting industry everywhere from PricewaterhouseCoopers, KPMG, to Grant, to Friedman, etc. The most common thread I have seen is trying to develop the firm's unique differentiators. That is a challenge that marketers in this industry face every day, because it's professional services. It's people. We are at our core selling relationships, and it's trying to find that magic sweet spot of what makes Citrin Cooperman's methodology unique from PWC's, unique from Friedman. It's regardless of size. We're all trying to figure out what those characteristics are.

Jean: Could you give us the high level of the approach you take to help figure out those differentiators?



Laura: I don't think I'm going to be saying anything that is new or earth-shattering from what other organizations do. We, as marketers, our partners and all of our practice professionals are our clients. We want to listen to them and understand what makes the culture of our firm, how we sell to our clients, how we serve our clients, and get the perspective from our practice professionals on that. That is when we try to find the unique characteristics that make Citrin Cooperman Citrin Cooperman.

We have a methodology that has been built from the very beginning. It's part of who this firm is. It's part of our DNA, our integrated business advisory approach. It's something the firm was founded on, and was dug out getting to know our partners, our different practices, how everybody has arrived here, the core values that the firm was founded on. It's listening and being able to interpret our people in the right way.

Jean: Then, I bet it's taking that information and making sure that your recruiting, training and brand is something that's genuine, that your people can live and breathe because it's truly who you are.

Laura: Absolutely. You mentioned in the beginning that we solidified our messaging. To be focused on what counts, and what we've been doing internally these past two-and-a-half years, is trying to live that tagline and that mission statement and what's behind it through every aspect of our firm, externally to our clients, our prospects, our referral sources, our friends in the industry but internally, as well, in terms of how we're defining and building on the existing culture. Also, engraining it now in the training that we've been rolling out as we've taken a look and restructured part of our advisory service line with all of the firms that have joined us. We've been very fortunate to have them all bring on different services, different consulting areas of expertise, and it has opened the door for us to even widen that breadth and approach.

It's lead to this, "Okay, so now we can refocus our training a little bit on how we're talking to our clients, and how we learn these services, and how we approach the more holistic view of who we are." It has spiraled from there to where we're building it into our new website that's coming out soon. We're building this whole DNA of who we are into everything that we're doing. It's been a lot of fun, and it's been exciting because we're getting a lot of favorable feedback. We're generating a lot of enthusiasm. It's clicking internally very nicely with everybody from partners down to staff levels, embracing who we are, and so it makes it fun.

Jean: I'm hearing that while defining those unique differentiators is a challenge, it's possible, and as long as you're proactive and consistent about it, it can make a difference within your firm and how you go to market.

Laura: The secret to the differentiators is finding what hits home for your people. When you believe what you're saying, and you buy into what you're saying, then you gain



momentum. It becomes real. Keeping it consistent is easy, because it's something that everybody knows and feels.

Jean: That's a great point. Consider the past five years. What are the biggest changes you've noticed in accounting marketing?

Laura: I think we've certainly seen fluctuation. Moving from Big Four firms to regional firms and in-between I've noticed different shifts at different times in the types of markets we serve, and the way that we name them, the groups that we put them in. It's always interesting to see the changes in industry classifications and the like from a marketer's perspective because we shift the way we build our plans based on how the different firms go to market.

There are two things that have been creeping along, for marketers especially. Number one, obviously, is the influence and growth of digital and social media. What professional services firms struggle with is, "How do we use this? How do we leverage social media so that it is impactful and drives business?" It's different than posting a new Pepsi ad because we're not a thing. You don't run to the store and pick up the auditor.

Jean: It would be an interesting concept though, wouldn't it?

Laura: Maybe there's a new campaign there. It's changed the way that we define thought leadership. Thought leadership was white papers, these big 20-, 50-page books and reports, more technical, and just very deep. Now, it's infographics, it's byte size, it's podcasts. It's, "What can I do? How interactive can I make it? How brief can we be and still drive a point home?" That's probably one of the biggest changes that we've seen and has shifted the way we go to market.

Second, is the trend in the accounting industry overall to move the way we are viewed, especially with artificial intelligence, and being more advisory, more consultative, and being that horrible word of "trusted advisor". That person, or those people, or that firm now has also shifted the way that we message, and the way that we talk to our clients in everything that we do, because it's not enough certainly anymore to be just an auditor, be just a tax provider. You have to be that business person's accountant, and that's taken on a new meaning. Those are two critical shifts that we've seen.

Jean: I agree with you on both parts, particularly that second point you made about being the advisor, and being able to be the advisor. There are probably lots of firms and CPA's who are doing an excellent job with that. I could also tell you that there are many more who are not, who think they are, and think they have it covered, and they truly don't. They're going to be in for a big surprise here especially with all you're saying about artificial intelligence, and block chain, and everything we're hearing about. You know, robots doing audits and how the industry is gonna change.



Laura: Remember the Jetsons cartoon?

Jean: We're totally the Jetsons.

Laura: I'm waiting for the one that cooks dinner, and that cleans the house, etc.

Jean: Walking the dog on the conveyor. The robo-maid. Whoever wrote that cartoon was an absolute genius because it is coming true right before our eyes.

Think ahead to the next five years. What's your prediction for any changes?

Laura: From an industry perspective, overall the cycle is turning. There'll be more consolidation, more joining, more coming together across the industry as a whole, especially with that invigorated shift now to being more the advisor and consultant, our client's person. In all that we do, there is going to be a need to leverage and understand how to be all things to our clients.

For marketers, I see a continuation of these trends. It goes back to we are selling professional services. You're selling to people, you're selling the relationship, you're building that relationship.

We're moving forward with technology, both from a digital and social media front, as well as the new challenges that are going to come into the industry with all of the different automations coming down the road. Relationship building is going to be more critical than ever. Technology has its pros and cons. It's all this new-fangled stuff now, and nobody knows how to talk to each other.

That is going to be a key theme over the next three to five years, focusing in on how do we maintain that human connection.

Jean: I think of all the technology that has been created in the time I've been in this industry. At my first firm, we didn't have computers. I remember the first computer we got, and it was the most competent admin who got the computer so she could pump out the financial statements. How things have changed over these decades, it's incredible.

Jean: Tell me what you think are the factors or skills that enable accounting marketers to be successful since we are in a touch profession.

Laura: You need to go in with an open mind, and understand and soak up what makes your firm run and tick because you have to be adaptable, and adjustable, part counselor. It's a partnership, and a partnership is a complex place to work because every



partner is your client. It's being able to work with and understand all of the different wants, needs, and perspectives they share because no two opinions are alike.

Priorities to one practice can be totally different than the other. It can shift completely differently to another. What works in one geography, even if you're talking about a regional firm, like us. We have 10 offices up and down the East Coast. I can tell you as clear as day that what works in Providence does not work in New Jersey, does not work in Long Island, and surely doesn't work in New York City. It's being able to see the big picture and then being able to distill it and customize it for 12 different audiences. Each office, each industry, you have to be able to multitask. You have to be able to adapt. You have to have a thick skin, too, and not to say that the accounting firms are a terrible place to work, they're not, I love them. I wouldn't be here for what is now actually (you were kind before) over 20 years.

It's fast paced, everybody's different, everything's a challenge. You need to be all things at the same time and understand how to manage your time and how to prioritize. Being the marketer, your role is very different from 90% of the firm. It's being able to pick up yourself, and get in there and do it, and show and demonstrate to your practice groups and your partners what marketing is and what it can do to help their business.

I've been lucky that all the firms I've worked for have been enthusiastic about marketing. They want marketing. They want people, and they want the guidance. They don't just want somebody to execute on and put together this event for me, or write this proposal for me. They're looking for that person who can advise them on how to use marketing and business development to grow their practice groups. That's wonderful, and it's something that maybe we as marketers don't take advantage of enough.

Jean: That is a wonderful situation for you and your team, because there are a lot of marketers out there who are order takers, unfortunately. The partners aren't looking to them for their additional input or experience or expertise, so it's a fine line within firms of just how big of a role the marketers can take.

Laura: I will always say this, I love a mess. There's nothing I love more than a mess. Somebody will tell me, "Well, I don't need marketing. I know everybody. I do all of this. I don't understand what you're going to do." I love those people because the best part is when I say, "Okay. Well, you don't have to do anything, just let me do this. Let me do this campaign or this event or this one thing. If it's successful, then you have to listen to me and if it's not, then okay, fine, I'll move onto my other partners, my other groups."

You are not going to change everybody, and you don't have to. Where our part sometimes fails – and I know it's a struggle and can sometimes even be intimidating depending on where you are in your career – is the ease at which sometimes they think we agree to take that backseat. He or she said, "Well, all I need is a tax compliance



proposal" or, "Well, we do this event because we always do this event" because it's easier sometimes and a partner is a partner, right? There's that distinction to it, "Well, they're our partners, and so I have to" but you were hired for your area of expertise. Like we said, we can't necessarily change everybody's mind. With a little bit of pushing, in the right way, you will make an impact. You'll see a shift. It won't necessarily be with everyone. It won't always be perfect, but I do believe that if you just push a little bit, things move.

Jean: You're leading right into another question I have for you. I think you may answer it the same way, because I love that comment you just made about agreeing to take a backseat. How can marketers gain more power within their firms? I think what you were just talking about is part of that.

Laura: Don't get me wrong, there's a right way and a wrong way to not take the backseat. You gain more power, influence, but you need buy-in. You need your clients. Wherever you are, if you're a manager of a particular practice group, you need the buy-in of that practice leader and that core partner professional team.

If you're in my role, if you are a principal and CMO, I can't do any of this if my CEO doesn't trust me, or hasn't bought in to the need for marketing, and be open to what it is that me and my team wants to do to help impact the direction that we're taking. It's the same for our office managing partners, our executive committee. I need that core client buy-in, and I'm not going to get that if all I simply do is come in and answer emails and say yes to every request just because I think I should.

You don't get the buy-in and the autonomy to have that impact at the firm level, practice level, etc. if you don't have a voice. For better or worse, my voice isn't always heard. I don't always get my way. In fact, most of the time, it's, "Yes, I hear you, but...", which is fine. What's appreciated more than anything else is having that opinion and being able to express it, and being able to have a conversation with your partners, your CEO, your executive committees or your OMPs about your views, what those perspectives are because without that dialogue everything moves along the same way. It always has, and nothing changes, and firms fail.

Jean: Then, there is the issue of expectations and what the partners were expecting of the marketing professionals and vice versa. You are making a wonderful point. If you are just going in there and saying yes and agreeing to everything, then what happens? Let's face it, you're the Marketer of the Year. You're a busy woman. You need to prioritize as well, because you're busy as it is. Imagine if you said yes to everything?

Laura: If I don't know the expectations and the vision of my partners and my CEO and the firm, how can I possibly help them if all I'm doing is saying yes and being an order taker? Nobody's learning on either side. Nobody's benefiting. Nobody's going to move anything forward. I have to be transparent. I have to be clear and you have to be able to



have conversations. They are your biggest priority. They are your biggest clients, and you won't be successful if you don't talk to them.

Jean: Tell me then, what is your best piece of advice for accounting marketers?

Laura: Therapy. No. I think the biggest thing is to understand and embrace your partners, every partner, as your clients. As much time as we spend helping our partners define what their clients mean to them, and what their approach is, it's imperative for us to do that for ourselves and sit down and say, "Okay, what's my mission and what's my methodology for serving my clients? Am I being successful? Am I checking in with them and seeing how that's going?" I think that relationship, just like the relationships that we're trying to pitch to our firm's clients and our prospects, that's the same thing here. Relationship building is key because without it, you could be the smartest marketer in the world, I could be Marketer of the Year every single year, but if I suck at building relationships, that's an SAT word, by the way...

Jean: You're doomed.

Laura: You're doomed, and it doesn't matter how smart you are.

Jean: Then, on the flip side, what is your best piece of advice for managing partners?

Laura: If I look at Joel Cooperman, I think he does a phenomenal job. The firm is what it is, in part, because he listens. As well as our executive committee and OMPs, they listen to their people. They listen to the market. Joel is open to ideas and open to change. He absolutely sees where the industry goes, where the changes are in the different groups of professionals as they come in and what we need to be successful. It is listening to all of that, and then understanding what makes sense and what doesn't to move into your organization, and how to customize things so that it's ours at the end of the day because everybody wants to go home feeling proud of where you work.

If you have a managing partner that understands how to take the voice of the people, and figure out how to make that voice work for who we are and implement that, then I think everything else falls behind because, again, he's building relationships of loyal and happy personnel. When you have that, hopefully, you will have happy clients and people that are going to be with you and grow with you for a long time. Then, you have firms that want to join everything, it snowballs. It starts with that.

Jean: That's a great piece of advice. We've been talking today with Laura Kucera, Principal and Chief Marketing Officer at Citrin Cooperman and the 2017 Marketer of the Year.

Laura, it's been a delight. Thank you for your time today.



Laura: Thank you so much, Jean. This was a lot of fun.

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