

A Capstone Conversation With Melissa Brogan



Marketing Director
Barnes Dennig



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), President of [Capstone Marketing](#). I am delighted to be talking today with [Melissa Brogan](#), Marketing Director of [Barnes Dennig](#) in Cincinnati, Ohio and the 2016 [Association for Accounting Marketing Volunteer of the Year](#). This award recognizes dedication to AAM, involvement on committees and special projects as well as professional accomplishments.

Melissa has been instrumental the past two years in producing AAM's annual conference and is known for bringing a fresh perspective to whatever marketing project she works on. Melissa, congratulations on being selected as AAM's Volunteer of the Year.

Melissa: Thank you, Jean. It's a pleasure to talk with you today.

Jean: Was it a surprise to you when you received this award?

Melissa: It was! I was so involved in the conference and actually I think I missed the beginning when they were announcing it. Our coordinator won as Rookie of the Year. There were two Rookies of the Year; I had nominated him and was hopeful that he would win. He was the second one announced, so then we held out to the last minute. We were taking his picture and then sat down. Then, I started hearing things that sounded a little familiar and I thought, wait a minute.

Jean: And, then you realized it was you.

Melissa: Yes, that's kind of tricky how they do that.

Jean: Yes, someone is out there doing exactly the same thing as me.

Melissa: Huh! Weird!

Jean: Melissa, you've been in this industry for quite a while now and I know that you've advanced through your firm and now serve as the Marketing Director Barnes Dennig. What is the greatest challenge you find in marketing CPA firms?

Melissa: Maybe I'm still in the midst of the conference and the theme of innovation, but I think that the greatest challenge right now is innovation and continuous improvement. CPA firms are known to be slow to change. Now, we have to not do the same things or



offer the same things as we did last year. We have to think differently and explore other possibilities because there is so much constant change.

Jean: How do you do that? Do you evaluate past projects or seminars before you start organizing for the current year? Or, do you brainstorm everything?

Melissa: We have a lot of long-standing programs. I've been here for 14 years and our seminar series and benchmarking reports are things that we do on a recurring basis, so always trying to look at it with a different perspective. We have a marketing coordinator who's been with us about a year and a half. He's got fresh eyes; we also bring in different partners, sponsor companies, so we're always trying to look at a way to do it better and not necessarily do it the same way. Build on what was successful but to also consider different things and that was what we tried to bring to the conference as well. Having that as part of your experience as a way to inspire you to go back to your firms and think through everything a little bit differently.

Jean: And not to just to do something just because that's the way you did it before.

Melissa: We had three keynotes, and one of them said, "Better isn't better, different is better" so trying to think of something in a different way.

Jean: That's an excellent point because I think we could all get caught up in, "This is how we did it," or "I know how to do it this way." Or, "I'm pretty sure what the results are going to be and I'm just going to keep doing it this way."

Melissa, what are the biggest changes you've noticed in accounting marketing over the past five years?

Melissa: There has definitely been a lot of change going on. The past five years have been exciting, maybe sometimes stressful at times but the biggies that come to mind include leveraging technology in automation and our industry embracing those things.

For us specifically at Barnes Dennig, CRM and marketing automation has revolutionized the way that we communicate and the way we do everything. It saves our time for higher payoff activities while we're connecting the dots on all of our communication and lead generation. Also specializations, which goes hand in hand with that technology piece. There are so many facets of technology that professionals can find a micro-niche in these efforts, so it's not surprising that technology and specialization are changing for accounting marketing just as they are for the profession as a whole.

The last thing that comes to mind and the most important is the growing seat at the table that accounting marketers have. We're no longer consulted on things after they happen. We're a part of those conversations now and as marketers, we're inherently more comfortable to change and ideation. It's great to be included on those discussions



about new service offerings and M&A and other high level opportunities at the beginning instead of being consulted at the end.

Jean: I think we would agree that there has been progress in that area that many marketers are at the table, as you say, having those conversations about strategy and seeking input from the marketers. But, there are still many out there that do not have that level of authority. How do you think that evolved at Barnes Dennig?

I need to mention that there is a power team at Barnes Dennig. The marketing coordinator that Melissa referred to earlier is Ian McManis, who won the Rookie of the Year, so be sure to listen that Capstone Conversation with Ian. And, [Chris Perrino](#) is their Principal/Business Development. I asked Ian and I'll ask you too, how do you think that evolved at your firm, that the marketers do have that seat at the table?

Melissa: We have a wonderful team and I feel very blessed that I get to work with two such great people every day. Chris and I have worked together for 14 years, and I think he's been here for 18 years, so we know where things started. Accounting as a profession goes back so far, I'm not going to even take a guess. To see how accounting marketing began and how it's come along. I think sometimes I might bore Ian with tales of the olden days when I started out.

There was something called the fax press that we would use as a method of sending out information (and I'm going to date myself now), but that was part of what we did because that's how people sent and received information. We did more mailing and we were breaking into emailing and maybe we were a little behind in that perhaps (or maybe we were ahead), but we were kind of on our own timeline as it made sense. That's why I said technology is such a critical piece because there were a lot of things that at the time you just had to do it that way and now there is a better way, there's a different way to do it.

That is why I think "better isn't better, different is better" resonated with me.

Two years ago, one of the things that I came back with from AAM was CRM and the marketing automation. I wasn't sure we were there yet, but thought we have to be doing this now, we are ready. We're so past ready for this and then trying to build a case to show why we need it, how we can pay for this and the value that it will bring.

I do have a passion for the conference and it's so energizing, and you know it's where you hear what is going on in the industry. You can really broaden your view and slice out a few things that you need to be doing, things you need to be changing and that was a big one.

It took a while to build the case, to get approval and then to select those things. But the payoff on it and what you can do and what you're able to do with your time. We spent a



lot of time doing administrative things and they are automated now. We have the opportunity to do more with less. We traditionally have three people in this department and so the use of technology has really been able to open up our time.

The main thing to all of this is our culture. What is it? Is it power that eats culture, or culture that eats power for breakfast? We have a culture where people listen. One of the managing partners at an AAM session was saying when you have these great ideas, pick out the few and explain it in this way when you go back to your managing partner. It was almost a way of translating from marketing to accounting why this makes sense. And maybe just the three of us working together for so long and having the culture that we do just helps that dialogue to continue.

Jean: That's wonderful, because I know that's something that all marketers are trying to achieve. Some are really doing a fantastic job and some could use a bit of help. There are also cultures at some firms that just won't allow it, unfortunately. The three of you are in a great situation and are able to do many fantastic things for your firm.

We just talked about changes. What is your prediction for accounting marketing for the next five years?

Melissa: We're going to see more of the things that I mentioned above continue to evolve, but I also add that we have to think about the impact that all of this M&A activity will have down the road and think more globally as our firms continue to merge and grow and grow at a faster pace than we have ever before. There will end up being some growing pains. In the past it's been pretty fragmented with many firms that are significantly smaller and then larger, but you're going to see more regional or super regional firms. That is totally changing the landscape. I think it's too soon to know what that means for us now but it's something that we want to watch to see how we need to innovate and how we need to adapt to that.

Jean: And how that's going to impact how the firm positions itself and your brand and marketing programs and your technology and all of it, I absolutely agree with you.

What factors or skills enable accounting marketers to be successful? I know you've got a big network, so when you look at those people, do they have things in common that enable them to be successful?

Melissa: Yes, and thinking of the AAM membership, I think that we all feed off each other. When we get a chance to be on a call, when we get a chance to be in person, or in Summit because we are a bunch of cheerleaders at our firm. We're encouraging people to step out of their comfort zone, we're encouraging them to embrace new ideas and we all get together. There is just this palpable reunion, family reunion.



Another factor is having empathy. When you come from a place of wanting to help people, you can usually find out what it is that they're trying to get to, even when there is the translation problem between marketing and accounting. That's the common denominator.

And lastly, maybe most importantly, is being trustworthy. People trust their CPAs and the accountants want to know that they can trust you and the work that you're going to do. You might need to prove yourself to show that you'll follow through on what you promised and to be able to make them successful.

Jean: It's absolutely a team effort. So having said that, which of your personal skills contributes most to your success?

Melissa: I'm the oldest of six siblings, so being a helper has always come with my territory. As long as someone knows that you're there to help them, they are usually open to at least hear your ideas even if they don't necessarily agree. Being scrappy I can say.

Jean: That's the first time someone's used that word in Capstone Conversation, scrappy.

Melissa: It may be a more eloquent way of saying that it's being resourceful and able to make things happen with a big idea and a little budget, but being scrappy and being positive. I think a smile and a thank you and a good attitude will go a long way because things aren't always easy. Things can be very challenging but as long as you are having fun most of the time, enjoying what you're doing, the people you're working with and you have a positive attitude, it goes a long way.

Jean: That's probably good advice for life in general. How can marketers gain more power or influence within their firms?

Melissa: Our first line of clients are our employees and partners, all the way down to co-ops and helping them find the best way to serve their clients, even if it means being brought out of their comfort zones. If you can prove that you're there to help them to provide value to the clients and bring in new ones, then you make yourself a trusted advisor to the trusted advisors. Letting them know that they're your first clients and you want to help them be successful.

Jean: There's that word trust again, which you mentioned when we were talking about skills of successful marketers. Being trustworthy is important.

Melissa, what is your best piece of advice for accounting marketers?

Melissa: My advice for accounting marketers, especially new folks, or single person marketing departments as well as everybody, is that accountants and marketers are not



at odds. It can be challenging sometimes to be one of a few people in a company that's doing something different but I tell them that the complementary skill sets and the personalities between accountants and marketers is what makes us a great team. When you are able to leverage both sets of strengths, that's how we best serve our clients and each other and the growth of the firm overall.

Jean: What would be your best piece of advice for managing partners?

Melissa: My advice would be the same to the managing partners, the complimentary skill sets are really what help us make the most difference. I would also add that a creative mind is a terrible thing to waste. We're here to help them take the firm to the next level of growth and success.

Jean: They need to be willing to enable the marketers to do their jobs just like you're helping the accountants do theirs, would that be fair?

Melissa: That's very fair.

Jean: Awesome. Well, we have been talking today with Melissa Brogan, Marketing Director of Barnes Dennig and the 2016 AAM Volunteer of the Year. Melissa, congratulations again.

Melissa: Thank you so much.

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