

# A Capstone Conversation With The 2011 Marketer of the Year



Raissa Evans  
Executive Manager of Practice Growth  
PKF Texas



CAPSTONE MARKETING

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**Jean Caragher:** Welcome to the Capstone Conversation with Raissa Evans, the Executive Manager of Practice Growth at PKF Texas, who was honoured as the 2011 Marketer of the Year at the recent Association for Accounting Marketing Summit in Chicago, Illinois. The Marketer of the Year is an award sponsored by *CPA Practice Management Forum*.

As I mentioned Raissa is the Executive Manager of Practice Growth at PKF Texas. In that role she oversees the marketing efforts of the firm with a focus on executing initiatives to align with the firm strategy. This includes project management, campaign development and tracking, niche practice development, budgeting, event marketing, media relations, research, technology directive and pipeline management. Raissa is also the champion of the firm's digital strategy. She has led three website redesigns plus the first accounting technology blog *FromGregsHead.com* and launched *m.pkftexas.com*, PKF Texas' first mobile web platform which is also an industry first and Raissa trains firm leadership on social media tools and writes for the firm's Twitter account *@pkftexas*.

Raissa congratulations on being named the 2011 Marketer of the Year. It is well deserved.

**Raissa:** Thank you so much. It's a great honour. I was very surprised and overwhelmed and pleased.

**Jean Caragher:** And with that introduction, you are a busy girl at PKF Texas.

**Raissa:** I try to stay busy, yes I do.

**Jean Caragher:** Raissa, I know you've been with PKF Texas now for over eight and half years. What do you feel is the greatest challenge for marketing CPA firms?

**Raissa:** Thinking back over the history and being with the firm and what I know about accounting marketing, I think the challenge remains pretty consistent, and that is staying ahead. And marketers throughout other industries feel that kind of pressure, as well. The world is changing; it's a lot more international than its ever been. People are connected 24/7 in all time zones. And there's this great struggle for the mind share of



the target audience that you're trying to reach. The world's very noisy and it's hard to get your message through.

**Jean Caragher:** In your time in accounting marketing, what are the biggest changes that you've seen?

**Raissa:** I think that everything is speeding up. There are studies out there of how much more information that we're receiving these days than we ever have been. The international business growth certainly changes things a lot. Even local firms now need that sort of talent in-house to be able to address international issues from inbound and outbound companies. Marketers themselves seem to be better received in our industry. You'll see a lot more marketers being promoted, sometimes even to partners although that's still in the handful that you could count. Accounting firms of all sizes are now building marketing teams, something that's been unusual in past years. A lot of marketers were lone-wolves and now they've actually grown to be at least small teams on most middle market firms at least.

**Jean Caragher:** Why do you think firms are more opened to having a team of marketers?

**Raissa:** Accounting marketing is such a new industry; it only dates back to 1977 as you know with the Bates Law. I think that if you look at other marketing industries or other marketers within other industries, especially B-to-C, well number one they're older but number two they're able to take a lot more risks and change things a lot faster. We are pretty unique in that, not only is that a conservative industry, highly regulated and it's just as old as some other industries. The funny thing is that it's catching up so quickly. Marketers in our industry are learning from outside industries. They're taking the best practices from those industries. They're experimenting with tools and edgier campaigns and they understand the importance of aggregating and trading information for their audiences. And so, it's really startling to see how fast we're catching up.

**Jean Caragher:** What factors or skills do you feel enable accounting marketers to be successful?

**Raissa:** It's funny; there was a speaker a couple of years back at a (AAM) Summit, Dan Pink. I am a big fan of his. His most recent book is *Drive* and that's about what motivates people to make decisions, things like that. Before that he had a book about right brain thinking, and about how the only thing that you really can't commoditize or outsource is creativity and initiative. I think a lot of that is ingrained into a successful marketer's DNA, to continually push to do something a little bit more exciting, do something a little bit edgier to get the buy-in that fits into their culture. Also, these technology and social media tools have really expanded what we're able to do because



these things, although they take quite a bit of firm bandwidth, can be done on shoe string budgets. Now, I'm not the kind of marketer that would ever say social media technology is free; of course it's not free. It drives me crazy when someone says that because time isn't free, but it's certainly scalable, it can be done on all different scales and certainly done by anything from a marketing team to single marketers. That really makes it flexible in achieving some of these goals in our firms.

**Jean Caragher:** Which of your personal skills has contributed most to your success?

**Raissa:** That's a great question. Well, I'm also identified as a leader in social media and emerging technology, those movements, and my firm has certainly been instrumental in helping launch the first accounting technology blog, what we think is the first mobile website in the industry and, in fact, we just launched our second one the week before AAM, so we now have two mobile websites launched. I'm one of the first accounting marketers to begin tweeting heavily, and things like that. Those tools certainly helped me but I think one of the ways that they helped me the most is in building relationships on a one-on-one level. The resourcefulness involves in staying ahead of the tools that will help us be more efficient and achieve our goals along with building those relationships that do the exact same thing. The tenacity in those things, not only taking innate resourcefulness but partnering that with the tenacity and fitting into my culture here where I can approach my champions like Karen Love and Kenneth Guidry, with these sort of out-of-the-box ideas. Then, engraving that into our cultural without being intrusive to the processes and ideas that are already flying within the firm, I think that's been instrumental.

**Jean Caragher:** Speak another minute about that culture of PKF Texas, and you mentioned Karen and Kenneth, speak to your culture and how that's contributed to your success.

**Raissa:** It's been really great to have a number of champions here. I'll start with Karen. Karen Love interviewed me and from day one was inspiring to me. Her drive and her career successes to that point and, you know, she's come even further over the last nine years. She's always been an inspiration to me and she personally took me under her wing and mentored me. I had about four years of marketing experience coming into the firm but she certainly groomed the way I think in a professional services capacity. In the support in the team building skill that she has, in surrounding herself with folks who have different skills that somewhat she has, made it very comfortable to not only be heard but also to bring my own talents and skills, and not feel any sort of competitiveness that some teams feel and certainly made us all be working towards the same goal instead of working in any kind of competitive atmosphere. When we added Jen Lemanski it only helped to heighten what we're able to do. She's a writer and helps update our website and manages the blog on a day-to-day basis. It's been a really great



culture. At the same time even as early as when I came into the firm in 2003 and beyond, this firm had won the Best Places to Work in Houston. That's actually how I found the firm. I had left a previous position in a technology firm and I wanted to seek out a culture that cared as much about their people as they did about their clients. At PKF Texas we say that we have internal and external clients and I was really seeking out that culture. Accounting wasn't even on my radar screen but I went down the list of best places to work and found PKF Texas through a relationship that I had made several years before who just happened to be a very close friend of Karen Love. That's how I found the firm. I said two to three weeks into the job that I had found my dream job. It was everything I wanted to do in marketing and almost nine years later I could still say that today and that's really saying something.

**Jean Caragher:** Wonderful. Well, I'm glad for the day that they found you, as well, because you're a wonderful addition to our accounting marketing world.

**Raissa:** Thank you so much.

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

**Raissa:** I think it goes off of how I found PKF Texas and that is, find a way to stay inspired. Figure out what it is that energizes you and then do what you love. I think it's twofold, one is discovering what your strengths are and where your inspirations come from, and then second is finding the right champion that's going to believe in you and support you in doing what you love, because if you're in the right culture not only can you do what you love but you can stop to celebrate the successes along the way. It's a really inspiring, great feeling and will keep challenging your career to reach new milestones.

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

**Raissa:** The opposite is also true. Hire someone that you believe in and that you will make a part of your strategic team. Value and understand the role that they play and the business intelligence that they can bring. Give them a sit at the table, so that they can really contribute to not only bottom line revenue but also the firm culture that will be instilled into each new talent that you add to the team. Part of that, too, is creating a culture that attracts the best talent that you can find in your marketplace because without true talent to offer to the marketplace, then a marketer doesn't have very much that they can market from a firm. They've got to choose their firm wisely and make sure it's a "product" that they believe in and also can help shape it while they're there.

**Jean Caragher:** So, it's really more of a big picture here. It's not simply for managing partners to appreciate the value of marketing and perhaps making that decision to hire



a professional marketer or add to their marketing team. It's that culture and the confidence that needs to be placed in the market for them to be successful. Would you agree with that?

**Raissa:** Absolutely, because a marketer doesn't operate in this vacuum of pulling business out of a hat. They've got to have each team member in a firm be an ambassador for marketing and practice growth. It can't be done by a single person or even by a sales team; it's got to be engrained in everybody to provide what the marketplace needs.

**Jean Caragher:** My last question, put on prediction hat to see into the future. What is your prediction for accounting marketing for the next five years?

**Raissa:** I think that things are always going to change; I think that anybody that tries to say that they can foresee what's going to happen over any five year period will always be surprised. I think the important thing to know is to be nimble. Part of that is that things are going to be driven more and more by client preferences. People are going to determine whether it's through tools or through attention span what reaches them. Marketing is going to need to be engrained into the different culture because everything is going to need to be on the same page, and the talent, the culture is going to have to be driven by what the marketplace desires and what changes with them. Everything's going to need to be micro targeted, so that the message is very clear for the recipient in order for it to reach the recipient. I think also, even local firms are going to need to have international capabilities. Almost every business these days has some capacity of international work involved, and even the smaller firms are going to have to be able to provide that. On a truly positive note accounting marketers are beginning to be seen, and will continue to even elevate more, as thought leaders, and they'll write and speak from that position because we really have a unique insight into business as a whole. That's one thing that's really great about the accounting industry itself is that it always deals with the C-level professional and gets down deep into business processes and financials and all of these other things that are so basic to business, that we can provide a lot more thought leadership than we're being used for today.

**Jean Caragher:** On that point we'll end the Capstone Conversation today with Raissa Evans. Raissa, congratulations again on being named the 2011 Marketer of the Year, very well deserved.

**Raissa:** Thanks so much.

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