

A Capstone Conversation With Veronica Rodriguez



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Marketing and Business Development Specialist
PDR Certified Public Accountants



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), President of [Capstone Marketing](#). I am very pleased to be talking today with Veronica Rodriguez, Marketing and Business Development Specialist at [PDR Certified Public Accountants](#) in Tampa, Florida, and the 2015 [Association for Accounting Marketing](#) (AAM) Rookie of the Year.

Veronica joined [PDR](#) in January 2014 after graduating from the University of Tampa in December 2013 with a Bachelor of Science in Business Administration, International Business, and Marketing. She was hired by [PDR](#) to help grow the firm by developing and executing low budget digital marketing campaigns. Veronica is also certified in advanced search engine marketing strategies.

Jean: Congratulations, Veronica, and welcome to the Capstone Conversation.

Veronica: Hi. Thank you so much.

Jean: How does it feel to be the [AAM](#) Rookie of the Year?

Veronica: It's a great honor, honestly. I feel like all my hard work has paid off throughout this last year and a half. The support of my firm has enabled me to win this award and change the marketing for the firm, so I'm very excited.

Jean: Absolutely. I know you also serve on one of the [AAM](#) committees.

Veronica: Yes, the [AAM Minute](#) newsletter that goes out each month. We try and come up with content for all the accounting marketers to update them on trends.

Jean: This is a fine example, everyone, of how Veronica joined [AAM](#) and dove right in and participated on a committee. We always encourage everybody to do that, so thank you for doing that.

Veronica: Yes, of course. I wanted to learn more about the industry. I figured this would be a great way to get a support group of marketers and then learn about how to market the industry at the same time.

Jean: Very smart decision on your part. That's why you're the Rookie of the Year. You've been in this profession less than two years. In that short period of time, tell me what you think the greatest challenge is in marketing CPA firms.



Veronica: I came right out of college, and this has been the first position they've ever had for a marketer. I guess the greatest challenge, which I think a lot of the accounting marketers can relate to, is communicating the value of the marketing position for a CPA firm. We only have 35 people, so trying to communicate to the shareholder group that we can promote the brand and actually grow the brand awareness of the firm. The hardest part of it is trying to allocate a specific budget and explaining why we should have that budget for marketing.

Jean: How have you gone about doing that?

Veronica: For the year and a half I've been here, I started to work on some small projects. I created a whole new website for them.

Jean: One of the small projects was to create a whole new website for the firm ...

Veronica: I know. It's crazy. We did everything in house. Basically, it was through a WordPress template. I bought a new template and revamped the content that was on it. It was more about how the website looks. They had an older version, so I just tried to enhance that. Then, I did a lot of the social media. As we started to do these little things, a lot of our clients started to notice and they started to compliment the shareholders. They wanted to see how they could get a marketer of their own.

Little things like that enhanced our brand and started to convince them that marketing is something they needed and an important role for the firm. Even our marketing collateral was enhanced. That convinced them that this position is a value for the firm.

Jean: Your efforts were validated by your client base and feedback?

Veronica: Yes, which is surprising. They compliment on everything that we're doing and they've seen the changes. PDR has been running the same way for 40 years. This has been the first year that they've had a whole new marketing landscape.

Jean: You have some fabulous stats in your Rookie of the Year nomination. In 2014, there was a 375% increase of social media followers and positive client feedback pertaining to the campaign and the website. How did you go about doing that?

Veronica: The firm had just joined the BDO Alliance when I started. I wanted to capture that and show the community that we're now part of this Alliance. We're a local firm, but we have all of these resources that we can utilize that national firms use. That's how I created a campaign, *Local Firm. National Level Resources*. I broadcasted that all throughout our marketing collateral, including social media. No one was working on their social media, so that statistic of 375% was basically our Twitter followers.



In the beginning, I hadn't decided that Twitter was really something we should do, because you have to focus on it every day and make sure there's a lot of content for it. From our LinkedIn, we grew from 40 followers to now about 268. That was the main thing I focused on at first.

Then, Twitter started in December when we began to have a lot more content on our website that I could share. That grew from 30 followers to 240. That was just from December to around March or April. It's been a good transition. What I've noticed is that our engagement has increased. We talk to our not-for-profits in a different way. It is more relationship building. When I communicated that to the firm, they noticed how our relationship started to grow. We got even more compliments on all of our content through Twitter. I noticed that Twitter engagement was a lot more important than LinkedIn because we got to engage with them in a different way.

Jean: Isn't that interesting? When I think back on how we used to market accounting firms and what is at our disposal now, the resources that we have through social media and all the different ways you can communicate, it does open a lot of doors.

Veronica: Twitter, specifically, is just a way to give back to them. What I've noticed with LinkedIn, you just post articles and they can share it. But with Twitter, you get to retweet the things that your clients are doing, or your prospects. So it's helping each other out to share the services that everyone offers. That's what I like about it.

Jean: You made an important point there because you were able to start tweeting more when there was more content on your website. You have to have something to tweet about, so the development of the content and the resources was very important. Also, since the summer of 2014, the website generated over 30 leads. Tell us about that.

Veronica: It was exciting. With our new website template, we got to integrate our CRM system. PDR had a CRM system through InfusionSoft, but it wasn't organized. A lot of our client practice management system of our whole client database wasn't in it, and we didn't really integrate it with the website at all.

A good feature about our CRM system is that you're able to do inbound lead generation with it. Once we started to generate more content, I was able to produce landing pages, offer whitepapers, presentations, and all of our webinars. That is when it started to generate leads. We got a lot of people that wanted to get the whitepapers and wanted to sign up for the webinars. It ended up being very interesting because it was another thing that I could show the shareholder group about the value in this as long as you're keeping up with it.

Jean: When you can show them numbers, they're really impressed with that, right?



Veronica: Exactly. Everything intertwines. You have your content marketing, but without the specific keywords that people are typing in to look for your content, it all coincides with each other. As I learned the key phrases that people were looking for, I could generate the content. From there, I can develop whitepapers and it was just all one big mix.

Jean: Again, I know you've been in this profession just a short time and you know what some of the challenges are and you're developing your network of accounting marketers. What is your prediction for accounting marketing in the next five years?

Veronica: My prediction is everything is going to be more niched. Specialization of services, which was mentioned a lot throughout the conference. Basically, trying to figure out what differentiates your firm compared to everyone else. That's doing the traditional accounting services. For instance, we're trying to go more for the R&D tax credits. That's a big niche that not very many firms have much knowledge or expertise in. That's something we're trying to do.

I can predict that as being a big change. Another one is relationship building. We focus a lot on timesheets and recording time, but not on building those relationships with our clients, prospects and referrals. A lot more of that is going to start changing the industry a bit where we have to start focusing on creating those relationships as opposed to just getting the service done, and then that's it. We're trying to create that loyalty within our client base and our referrals, because that's who gives us our clients. I think that'll change for the industry.

Jean: With the marketers that you've met, what factors or skills did they have that enabled them to be successful? What have you noticed?

Veronica: I've noticed that a lot of marketers have very good interpersonal skills. Another one is content. Being able to be a great writer, nowadays, and being a thought leader is going to be an important skill to develop in a marketer's career. The digital savviness you are going to need. Everything is in a digital world nowadays. In order to have those different skills, content leads, the digital, just having all of those put together would really put that marketer at an advantage.

Jean: Speaking of all of this social and digital media, [Eric Majchrzak](#), who everybody knows, is fabulous marketer, and the Marketer of the Year this year. He described it in a fabulous way: that firms need to take what they've done in the real world, the brand they've built and the skills they have and the niches and everything else, and they need to translate that into the digital world. I thought that was a very simple way of describing what firms need to do.

Veronica: Yes, he's so great. He's helped me out a lot since the conference. We were able to share ideas.



Jean: He's a great guy, yes. I'll be talking to him soon, too. Which of your personal skills has contributed most to your own success?

Veronica: I think my interpersonal skills and being able to learn all the digital material that goes with it. When I first got here, I learned so much. I did research to see how to handle this position for a CPA firm since this is my first job coming out of college. I think my interpersonal skills came into play when I started to ask our Alliance member firms for advice.

Being a part of the [AAM Minute](#) newsletter, I learned to have that support group there and call them for help. Then, also just learning a lot in the digital landscape. Getting my SEO certification, learning about WordPress and website building, and social media and the way that everyone handles their own social media. You have to have your own story for your firm. This has helped me in my career so far with [PDR](#).

Jean: This might be a more difficult question. Do marketers need to gain more power within their firms? And if they do, how can marketers do that?

Veronica: I think they do need to gain more power, but more in the strategic planning part of it. Sitting down with the managing partners and discussing how they see things. Managing partners and marketers see the firm in two different perspectives. To be able to bring that marketing perspective to the table and show them what other marketers are doing and how you have to stand out from all the CPA firms in your target market, will bring them to that table of strategic planning.

Without marketing, you can't foresee where their brand will go. They always think about where they're going to be for the next five years in terms of their services and business development, but the brand and how to enhance that awareness in your target market is key to bringing that business development for the firm.

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

Veronica: To build that relationship with the managing partner. If you at least have them on your side, and they're able to convince the others about the value of your position, is big for the firm. Sitting down with him, getting to know him as a person and having him get to know you.

Jean: That's critical. One of the interesting things -- I'm sure you've noticed this, and we've touched upon it here today -- is that marketers are hired within CPA firms, yet you still need to prove your value in what you bring to the table. I find that so interesting. Even after decades of being able to market and promote their firms, that one side of them is telling them, "Gosh, we need someone here in the marketing world to help us,"



but there's still a fear of what that means for them. When the marketer is brought on board, you still need to demonstrate what it's all about.

Veronica: I see that at times, too. A lot of the shareholders or management will see marketing also as a business development role. It's hard to differentiate the two when you're talking to them, because marketers are usually for lead generation. We don't do so much of the business development. For us to communicate our value, we start to do more business development because they expect us to do that. That's also been a challenge on how to communicate that marketers don't really do so much business development, but you can still get value out of your marketing.

Jean: That's part of the education we need to keep giving them about what the differences are so their expectations are reasonable.

Veronica: Exactly.

Jean: Veronica, what's your best piece of advice for managing partners?

Veronica: To adapt to change and be open-minded with marketers. Let the reigns off a little and take a risk with them because, eventually, you will see that it will work out and it will pay off by taking those little risks with the marketing group.

Jean: That's not easy to do, right?

Veronica: Exactly.

Jean: Because not everyone's a risk taker.

Veronica: Especially with small, traditional firms who have done things the same way for so long, it might be the hardest.

Jean: We have been talking today with Veronica Rodriguez, the Marketing and Business Development Specialist at [PDR](#) CPAs, and the 2015 [Association for Accounting Marketing](#) Rookie of the Year. Veronica, congratulations again and thank you for your time today.

Veronica: Thank you so much.

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