

A Capstone Conversation With Rebecca Weiland



Practice Growth Specialist
Rea & Associates



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), President of [Capstone Marketing](#). I am happy to be talking today with [Rebecca Weiland](#), Practice Growth Specialist at [Rea & Associates](#), and the 2018 [Association for Accounting Marketing Volunteer of the Year](#).

A member of AAM since 2013, Rebecca has given tirelessly of her time and talents to the role of Chair of AAM's Member Growth Committee. From welcoming new members to working with other committees, to developing innovative member appreciation and satisfaction programs, Rebecca helps AAM achieve its goal of providing quality content and value to its members.

Rebecca, congratulations on being named the 2018 Volunteer of the Year. Great job!

Rebecca: Well, thank you so much. And, oh my goodness, thank you so much for that introduction. It made me feel good. I'm happy to do all those things. So, thank you.

Jean: It's well deserved. I know that you were not able to attend the Summit this year, unfortunately, but we all gave you a huge round of applause.

Rebecca: Oh, thank you. I appreciate that.

Jean: As I've mentioned, you're a Practice Growth Specialist at Rea & Associates. Tell me, what you think is the greatest challenge in marketing CPA firms?

Rebecca: To me, I think the best way to say it is making the industry sexy. You think of accountants and you're just like, okay. How do you make it fun and exciting? Especially since who wants to read about taxes or the latest update in QuickBooks, you know? It's important information that we need to know, but it's not all. I'd rather read something more entertaining or something that relates to my hobby or my interest. So, it's making that content informative but delivered in a way that will attract the reader, or attract your client, and engage them. I find that that's a challenge but it's kind of an exciting challenge, because it's using that creativeness you have to get them engaged and get them reading and following you.

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Jean: Can you give us an example of how you do that at Rea?



Rebecca: The biggest thing that we have done to embrace the making it fun and exciting and showing that side of accounting is we have our own podcast, "Unsuitable," on Rea Radio. It is similar to this podcast. Really laid back and relaxed. There's always the host, Dave Cain, who's a principal at Rea, always have a couple of beers, and there's beers for the guests to show that fun side. It's really edgy and not your typical, "Here's all this information." It's trying to make it more humanized by bringing in an expert and letting them talk and share their experience or their advice and share their story.

Jean: That's a great example, and I've spoken to [Becca](#) about that in the past. You absolutely have turned another marketing tool, that being podcasts, into a fun, effective promotional tool for the firm.

Rebecca: Yes, and it's nice because it drives a lot of our content. We have an episode that comes out every week and then we have relating supportive content to promote that episode. We develop our schedule for who we want as a guest. Then, we develop the relative content to go with it. Then, we sit back and watch, and look at the stats and see, okay, we have a lot of listeners this time, we have a lot of clicks on this. And, okay, this is what people want so we'll share more of that, or we'll bring in another guest that's similar, but gives a little bit more in-depth information or takes a different path with that information. It's really nice. It's our starting point for our content, and then it just flows into a variety of other pieces of content and information that we can share to our audience.

Jean: That's wonderful. Okay, so for those of you listening and reading, the podcast is called "Unsuitable" and it's on Rea Radio on iTunes, and where else, Rebecca?

Rebecca: We're on iTunes, we're on Libsyn. We just started putting it on iHeart Radio. You can also catch it on our [website](#). So, getting it out there.

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You can also catch it on our website, reacpa.com**

Jean: You've been a member since 2013. So, it could be about five years. In the time you've been in accounting marketing, what's the biggest change you've noticed?

Rebecca: I think it's really embracing the whole idea of content marketing and understanding that our audience, our clients, want information. But, they don't want us stuffing it down their throats. It's embracing and understanding how they want that information. Do they want a newsletter? Do they want a video? We're really embracing looking at how our audience, our clients, engage with us, and then sharing the content that way. It does create a variety. For example, we do a printed newsletter. We have e-newsletters. We have SlideShares. We have videos. We have presentations, webinars. We do it all, but we don't market and throw it out to everybody. We present the printed



newsletter to those who want it printed and listen to the audience and say, "Okay, well, what would work best for them?"

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Another example that shows the industry embracing this, we have a really strong presence in the Amish community, which is pretty big here in Ohio. They have a thirst. They love information. They just love reading, reading, reading. They're very much an untapped segment. So, how do we get in front of them? Well, we have to actually do a printed newsletter and mail it to them.

Jean: You don't hear a lot about that these days, right?

Rebecca: Yes, exactly. It's very simple. It's Times New Roman, 12-point font. There's maybe one photo, it's not very flashy. That's not what they want. They don't want the flash. They don't need all the colors and the photos and infographics. They just want the information. It's really nice because they're untapped. They don't have the internet, so they don't have access to all this content that we've already developed. We're able to take content we already have, readjust it to fit them, and then mail it out each quarter. We've more than covered the cost of making the newsletter by bringing on new clients. I think we're seeing that a lot more with a lot of firms. It's just changing how we're talking to them. It's more talking with them instead of sort of talking at them.

Jean: Right, not just throwing information out for everybody and not personalizing it, not targeting it.

Rebecca: Exactly.

Jean: Given that, what's your prediction for accounting marketing for the next five years?

Rebecca: I definitely think we're going to continue with that very personalized marketing. We have these tools, and I think CRM and marketing automation are tools that have been around for a while, but I know a lot of firms haven't really... I mean, we're a perfect example. We're getting CRM in the next couple of months, but it took us quite a journey to figure out the vendor, to figure out how to adapt it into our culture, and how to get engagement and get our employees using it. So, it's a long process.

I think it gets even more personalized to the point of more one-on-one because we can understand when someone comes to our website, especially with marketing automation, you can understand what's their goal, what they're doing, you're watching them, and then you can develop more content that's specific for their needs. That's



what's really cool.

I think it's a little scary, too, on working automation, but you can really understand this person is clicking on this article about business valuation. We can make suggestions based on their path or notify our business valuation segment leader, and say, "Hey, we had these people on our website today. They spent a lot of time reading this article. It might be good just to touch base and see if they want more information." I think it's becoming more to that personal level of marketing, reaching out to our clients, and really understanding their needs.

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Jean: Nowadays, don't you think that when people are cruising the internet and they're downloading information or they're reading articles, or whatever it may be, that there is the expectation that they know companies know what they're doing? Back in the early days when e-newsletters first started and we could tell who clicked on it and who opened it and read it, and, "Ooh, we're not supposed to actually let them know that we know they opened it." But nowadays, I think the expectation is there that they're going to get a call or there's going to be something that will happen as a result of them reading or using your information.

Rebecca: I agree completely. I think everyone has become so used to it, too. Now, if you think about you're on a company's website, you're on Kohl's website and you're looking at a pair of shoes, and you're like, "Maybe," and you're reading the information. Then, you go away. You then go to Facebook. You see that shoe right there. "Oh, my gosh. I was just looking at that shoe." It's like, "Hey, just a reminder." So, I think we're seeing it every day. I actually saw a comic book meme the other day. It was an individual and they're sitting at their computer and made a comment about the cookies. I don't want people knowing this information. I want to protect myself. No to the cookies. And then, "Oh, well now my shopping experience is not as personalized."

So, I think we're used to it. I think it definitely helps build the relationship with that company because I feel like the consumers want more than just, "I'm going to go to this store and buy this widget." They want an experience. They want it easy. They want it quick. They want a happy experience. I feel a lot of times we're buying experience than necessarily a product.

Jean: Absolutely, yes. Especially now with the focus on client experience and people within firms holding that role, client experience is their job, right?

Rebecca: Yes. How they can make the situation great for the client. I agree.

Jean: I know you've built a vast network in our accounting marketing world. What are



the factors or skills that you've seen that enable accounting marketers to be successful?

Rebecca: It's definitely being flexible and being able to adapt. Realizing that the same thing that worked five years ago, maybe two years ago, might not work again. And, definitely always...I like the phrase of, "Always improve everything." Just because it's working right now doesn't mean that there's nothing more you could be doing to make that service, make that piece of information better. We look at it like, well, we have this really great article and how else can we take that information and change it up? Can we put it into an infographic? Can we put it into a presentation? Do we make it a webinar? It's just always being ready to adapt and flexible to change things up.

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I definitely think creativity and thinking outside the box. I know I go back to the podcast example that we talked about. It was actually brought to us, or Becca, our Director of Marketing. One of our partners at the time brought the idea to her and she was like, "Who is going to listen to a podcast of people talking, who's going to listen to that? No one's going to want to listen to it." But, we did some research and discovered that the people that are listening to the podcast is our audience. It's who our clients are, like the clients we want to get. We're like, "Well, let's try it out." It's been very successful for us. I think we have that thought of, "Well, accounting is more the suit and tie." No, it really can be fun and exciting. You need to think of how it will work for you. But, definitely thinking outside the box.

Then, there has to be an element of curiosity. One of the things I always talk about, one of my traits, is curiosity. I always have to know the answer. Why has something worked? Or, why didn't it work? At Rea, I work more on the analytical side looking at the results of our campaigns and things like that. Having curiosity to understand what is driving your success or what can be improved and looking at the numbers can bring in new ideas and new thoughts. I relate to that curiosity of also with the hunger. Keep trying, keep looking and stuff like that. I think those are some of the top qualities that will definitely help marketers be successful.

Jean: In addition to that curiosity you have, which of your personal skills has contributed most to your success?

Rebecca: A lot of it relates to understanding the why. I think that's why I definitely work more on the analytical side. I want to understand why this segment of ours is performing so high. Every month we create segment reports that look at our revenue by our services and by the industries we have a lot of clients in. We can see that this one industry is constantly improving, so I'm reaching out to that segment leader. "What are you guys doing? What's going on?" Talking to them and understanding their engagement because I want to share that information with the whole firm. If they have



something that causes them to improve 20% from this time last year, what's that reason why?

Every month we create segment reports that look at our revenue by our services, and by the industries we have a lot of clients in.

The same thing with our website visits. We're kind of normal, tax season you always get a lot more searches and you come up a little bit more. Then, right after tax season we always have a little bit of a dip in visitors and then they come back up. It's understanding why that happens? What do we need to change on our content or on our marketing to kind of flip things up, or what are people wanting instead of taxes? They're still searching something. It's adjusting and understanding why. That's what I think.

Another one of my personal skills is never giving up. I don't like to give up and be like, "Well, that's just the way it is. No, no, no. There has to be some reason as to why that's the way it is." I definitely relate all that stuff and wraps into my curiosity as I mentioned a little bit before.

Jean: So, you're persistent.

Rebecca: Yes, that's a good word for it. Persistence.

Jean: Well, it sounds like it, because if you're not giving up and you really want to get behind the information and why things happen as they do, that takes persistence.

Rebecca: Then, I think another personal skill of mine that helped there is I work a lot with our one manager. She's our content girl and she's amazing. She can write content. She can make the most boring subject so interesting. What's worked really well with her in our skills is I'm not like that. I'm not the writer. I'm not the creative mind behind that. I'm not the artistic one. But, I can understand stuff, or I'm willing, I'm very analytical. I'm able to be, "Okay, here. In looking at our stats, here's the information people want or here's the information they're currently engaging with. How can we make it look good?"

We'll be honest with each other because she doesn't enjoy that part of looking at the numbers, looking at the stats, but I do. I can relay back to her and then she'd respond, "Okay, well, this is what we're going to do to make it fun and get people writing or get people engaged," and we'll just do it that way. For me, in my position, it's my analytical thoughts and the brain and how it's always wanting to look at numbers.

Jean: That's a great example of a marketing team with the members placed in the appropriate roles, depending upon your skills and your areas of interest. Even with marketers, there's all different types of marketers.

Rebecca: Yes, there are. Our team is very unique. We've done a lot with understanding



our skills and have done testing to understand what our strengths are and our top strength, the strength finders test is the one that we do a lot. We have adjusted tasks and moved things along to make sure we're doing what interests us. It's nice, especially when you're in a team role, to understand that of each other. When we did the test, the strength finders test, we then all got together and talked about what our top strengths were and explained what that meant for us. We found a-ha moments. We're like, "Oh, so that's why you're like that. Or, that's why you're that." Then, we understood each other better, too, and it helped us work together better.

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and have done testing to understand what our strengths are.**

For a team, there's so many different kinds of tests, but to get together and get to know each other and understand what your strengths are is huge, and to making your team work really well together.

Jean: That's terrific. So, Rebecca, we hear a lot about getting a seat at the table. We've seen marketers achieve that chief marketing officer, or principal, or partner level. How do you think marketers can gain more power or influence within their firms?

Rebecca: There's two ways you can do this. One, when I first joined the firm about five years ago, Rea does a lot. We're going and you're talking to a client, a prospect, a referral. It's not a sale. It's talking to them and understanding their needs and their thoughts. It's one of the things that, at Rea, we really encourage a lot of people to do. We did that with the partners. The marketing group went around and met with partners and we asked them a bunch of questions to understand their thoughts and their hesitations. Or, what they liked, what they didn't like. It opened, especially me when I was just starting, it helped me understand what they were thinking.

We had them mention, "Well, we didn't know you guys could do all this stuff." Or, "No one reaches out to us." We're, "Okay." So, we made a note. "This partner wants us to touch base more with him," so we can do that. We had another partner mention, "Well, whenever I bring ideas to you, you guys don't really seem engaged by them, or you seem to pass over them." That's not what we're trying to do. We have a lot of people that we're trying to please. So, we're like, "Okay, we'll make sure we're listening and engaging."

We had some partners that said, "I don't need any help. I don't want anything." So, we're like, "Okay, we'll focus and work with the partners that really want to work with us." It's engaging and talking to them to understand their needs and their thoughts.

Jean: Because they are your clients, right? The partners are your clients and you need to understand them.



Rebecca: Exactly. Another big thing is proving it. We work with accountants. They want to see the numbers. That's what they like, numbers. I go back again to the podcast idea. Just because when we did the research, when Becca did the research, she saw that here are the people that are listening to the podcasts, here is what happened, and we really understood the numbers, the results of it. She then put that together in a presentation and presented that to our CEO, and showed him, "Okay, this is what we can expect. We're reaching the people we want. It's growing and people are doing podcasts more and more." I think it's proving it.

When we do a campaign for them, show the results. Show, "We had these many visitors come to this," if it's an article, or a webinar, "we have these many listeners." Then, we've gotten to the point where we're trying to track web leads that come in and where they go, if they get on the pipeline. Then, if they become a client, how much money we get from it to show the ROI of the website. Track your results in detailed amounts and share that information so you can show that this is why it's working. That helps them.

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Then, it's speaking to them the way they want. They don't want to always hear that, "Yeah, we produced 250 articles this month." "Okay, but those 250 articles resulted in these many clients or these many visits or this much engagement," and show, "We got you this from all this that we did."

Jean: Absolutely. You're providing the evidence of what the marketing program is bringing. That's great advice for everybody, actually. What is your best piece of advice for accounting marketers?

Rebecca: Don't be afraid to ask. There are so many great resources out there, the Association for Accounting Marketing is one of them. There are other people that are in your shoes that understand what you're going through. Don't be afraid to ask for help, or advice, or just feedback. I've known, especially with my experience with AAM, is everyone is very open and they want to help and they're willing to share. If you're stuck on an idea or want a way to improve something, reaching out is great. A lot of times we don't have to reinvent the wheel. We are looking for how do we get more audit clients? Or, how do I get more attendees to my webinars? Ask that of your colleagues and they'll be willing to share. Then, you can take an idea that they had and tweak and make it work for you. It's not being afraid because I know a lot of times there are firms out there where there's just one person in marketing. It's harder to turn to someone and be like, "I need your help with something," when it's just you.

Jean: Unless you have a conversation with yourself, right?

Rebecca: Yeah, and you can do that, too. I know I do it. Definitely don't be afraid to ask.



Then, we use this saying in our team, "Be fearless." Don't be afraid, and don't be afraid to do something new that might not seem typical. Definitely be fearless and try something new, especially if you've looked into it and seen success from other firms or other companies, just try it, you know? If you don't, then you might miss an opportunity for some great revenue or experiences for your firm.

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Jean: Let's wrap up with the question of your best piece of advice for managing partners.

Rebecca: I thought about this one. Certainly, being fearless can fall into that category, as well. It relates back to what we were talking about with content marketing and the personalized experience. Managing partners, it's great to make sure you're understanding your clients and really listening to them. As an industry, also, we mentioned and talked about changes, from the more of the accounting side, I think things are changing to where our clients and prospects are not looking for just that tax person that's going to do their taxes, here you go, we done. Or that audit person who's going to run, do the audit. "Everything looks good," and be done.

They're turning towards us, the accounting firm, for more expertise, almost like a consulting side of it. If you have to build a relationship with that client and really understand them, but you're looking at their tax form or you're looking at their audit, you can definitely see insights and provide feedback of how they can improve. I think the consulting side is where we hear a lot of firms are going to that, because it's really what the clients want. It's a huge opportunity and it's understanding them and learning about them. Sometimes you have to go a little bit further. I know at Rea, we try to almost...I don't want to say Facebook stalk, but we have our top clients and we're watching them on what press releases are coming out, what they are doing on social media. Really learning about them and engaging to understand who they are and then build a relationship.

A lot of times, they are looking for a person at the table to sit with them, "Okay, this is what we can do to improve your business. This is what we can do to get you guys with succession planning." It's not something you do two years before you want to retire. It's something you have to five to 10 years out. We want someone to help them to get them down that path so they can retire the way they want. It's really going a little bit above and beyond than just the normal tax return, and understanding them and helping them to see the light.

Jean: You've just given some great examples of how the marketing director, or marketing department, can help the partners and managers develop those relationships with the clients.



Rebecca: If we can pay attention and help you guys watch if there's a client, that is a big client of yours, and they send out a press release where they're celebrating their 50th anniversary. And, for whatever reason, like, "Oh, great," you can share that with your managing partner and say, "Congratulations." Or, if there's a change or a new employee is coming in, you send the congratulations. We had a client and they were nominated a top place to work, you know how everybody does those, and they were nominated. I sent a quick note, "Hey, I just saw that this company was nominated a top place to work. Maybe just give them a quick congratulations email or something." Those meaningful touches, they really make an impact.

You can share that with your managing partner and say, "Congratulations."

Jean: I agree completely. We've been talking today with Rebecca Weiland, Practice Growth Specialist at Rea & Associates, and the 2018 Association for Accounting Marketing Volunteer of the Year. Rebecca, congratulations again.

Rebecca: Oh, thank you. I appreciate that so much.

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