

A Capstone Conversation With Korby Boswell



Marketing & Growth Specialist
Adams, Brown, Beran & Ball



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), President of [Capstone Marketing](#). It is my pleasure to be talking today with Korby Boswell, Marketing & Growth Specialist at [Adams, Brown, Beran & Ball](#), which we will refer to as ABBB, who was named the 2019 [Rookie of the Year](#) at the recent [AAM Summit](#).

Since joining ABBB in December 2016, Korby has played an instrumental role in supporting and growing his firm. His accomplishments are impressive. Related to social media, in 2018 the firm's website new users had an increase of over 4,000 from the prior year. He was instrumental in creating engaging content that grew impressions from 7,400 in 2017 to over 74,000 in 2018. On LinkedIn, engagement has more than doubled from 1,126 to over 3,000.

Korby was also involved in the firm's first Google AdWords campaign. The firm's business tax services web page received over 1,100 clicks and over 50,000 impressions in the past six months. Korby is also part of the firm's bi-weekly pipeline review meetings and, in fact, fills in for the managing partner when he's not available. The pipeline has over \$1 million in wins over the last fiscal year. Korby contributed to those new client wins by writing customized proposals for many sizable opportunities that the firm was involved in. I could go on, but I know you want to hear from the Rookie of the Year himself. Korby, congratulations, and welcome to the Capstone Conversation.

Korby: Thank you so much, Jean. What an intro. I am so flattered and I'm glad to be here. Thanks for having me on the Capstone Conversation.

Jean: You're very welcome. It's always wonderful when we read about successes like yours and you can attribute your success to specific results, which I know we all strive to do. So, great job.

Korby: Thank you.

Jean: You've been with your firm just over two years now. Can you tell us what you think the greatest challenge is in marketing CPA firms?

Korby: I have a couple of thoughts to answer this question. The first is that technology is changing every day. I feel like I get an email or a new flutter in my inbox about once or twice a week and it's a game-changer in the marketing industry. Not only are we seeing, in our practice area, that technology is coming in and impacting the way we do business, but marketing automation, for example, is certainly entering the marketing world, as



well. Technology is happening. Technology is changing the way that we operate. In addition to that, and alongside that as being a firm of the future, there's a lot of talk about 1040 tax return work going away. There's a lot of shifting happening. [Barry Melancon](#) gives a great keynote on what's going on in that regard as well.

Technology is happening. Technology is changing the way that we operate.

The second answer is the ability to tell a good story. I think it's certainly a challenge in accounting marketing. How you take something so technical, so legalese, and flip it into a story that can be digested by the audience you're trying to target.

Jean: A story about that riveting audit, right?

Korby: Right. It's certainly a challenge and a skill that I'm continuing to work on to be able to flip that, communicate, tell your story and sell your firm.

Jean: It gets back to Simon Sinek and the why. It's not just what we do, it's why we do it. And what that means to our clients.

Korby: It certainly does. I have a sticky note on my monitor in my office that says, "Show them what we are, not tell them what we are." We want to be able to show and tell good stories about who we are and what we do rather than say, "Hey, we do taxes and audits and CFO consulting."

Jean: Let me steer off course a little bit. Can you share with us the different ways you're collecting those stories?

Korby: Yes. I do some interviewing. We were going through [Gale Crosley](#)'s practice growth initiative, and part of that is specializing by service line and industry. We're making some headway there, which is good news. Part of that is this continued idea of thought leadership. Thought leadership is certainly not new, but we are getting our service lines and industries revved and ramped up and out there producing content. Some of that comes by way of me doing an interview, getting it out of them and then prettying it up in terms of words, our approach, the pictures, and how we want to showcase it.

There was a really interesting idea that came out of AAM Summit, and it's a no-brainer. I don't know why I didn't think of this earlier, but it was [Abbey at Rea & Associates](#) that said, "Ask them if they've been answering questions for clients in an email. If there's a paragraph that they've been using to respond to clients, can we turn that into a story?" I used her idea yesterday in our Marketing Committee meeting and I have two people that said, "I do think I have a couple emails I could forward your way that we could



massage into some custom content for our clients, and for the firm, and position ourselves accordingly.” So, it's all about learning what you can and using what you have.

Jean: I often counsel my clients, as well. If they were to look at their inbox, what sort of questions are your clients asking you? If you have more than one asking the same type of question, you have more clients that are also asking that same question. It's a great way to develop content and to solve a need.

Korby: There's no reason to totally re-invent the wheel there.

Jean: Again, I know you've been in this industry just a couple of years and you've talked about technology and how fast things are changing and being the firm of the future. Do you have a prediction for accounting marketing for the next five years?

Korby: We can certainly throw a dart at the dartboard and we can make some predictions, but I have a few thoughts. I think automation is certainly going to be increasing in its capacity in what it can do for us. Automating those repetitive tasks that we do, whether it's done by a bot or a CRM or some sort of task management software, automation is well on its way. I think there's going to be some new best practices, that we don't know of right this second that enter into the space in the next five years. Robotic process automation and bots and continue with auditing and all of those technologies, they're popping up like crazy.

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We're not completely insulated from that happening to accounting marketing either. In more general terms, the trend in marketing and accounting marketing is people are going to the internet to look for you. So digital, it's here and it's here to stay. There was an interesting session at AAM where they were talking about leveraging YouTube as its own kind of search engine, which was really interesting. I have a whole bunch of notes about that, that I need to go back and decipher. You may have been in that session as well, Jean. I'm not sure.

Jean: I was at the video presentation. I found that fascinating. That was an excellent session.

Korby: I think the session overall was about video, but then she had that section about how you can leverage YouTube and how there were, it seems like, a bajillion people out there looking around on YouTube, which is not a surprise. Seeing that number on a PowerPoint slide in front of you, it's like, oh yeah, there's a lot of people on YouTube.



Jean: Korby, tell us what skills or factors have enabled accounting marketers to be successful? As you're building your network, and you're meeting people, do they have things in common?

Korby: I think accounting marketers are go-getters. Just interacting, I probably met 20 or 30 new people at AAM Summit. It's the people with a lot of energy, a lot of drive, a lot of passion and they get stuff done. Their ability to think strategically certainly falls into that wheelhouse, as well. I think accounting marketers can, and must, be flexible. I didn't have any in-depth conversations with anyone at AAM Summit about flexibility, but you never know who's going to be calling you or emailing you or knocking at your door for help with something. Being able to prioritize, which is the biggest fire to put out first is a skill that probably all professionals, but specifically accounting marketers, need to continue working on and owning so that we can be effective at addressing the challenges that may come across our desk or some of those more fun projects, too.

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Jean: I think you've just hit a hot button there when you talked about prioritizing. I don't know any accounting marketers who have a lot of spare time without anything to do, and I don't think you'll meet any either. It's really important that accounting marketers be able to prioritize and focus on those most important, valuable things because your partners may look at you and know that you are busy, but they might be wondering, *what is he doing? What specifically is he working on?* You have to focus on those most important things and then make sure you're communicating that back so there's no mystery on the part of the partners about what you're doing.

Korby: Absolutely. It's not a secret, but that is an interesting caveat of working in a professional services firm. Marketers and accountants, for example, tick in very different ways. Communication is key. You're absolutely right there.

Jean: Tell us which of your personal skills has contributed most to your success?

Korby: There are probably two or three skills that have set me up for the best odds, so to speak. The first one is willingness to listen. I studied communication in college and there's whole chapters and books and classes out there about how to be an effective listener. There truly is an art in being able to listen, whether it's in your home life, or your work life, or wherever you are. If you can't listen, you can't make sense of things and you can't go act on the things that you're supposed to be acting on. I'm not saying that I'm the perfect and best listener, but it's certainly something that I'm cognizant of, and strive to become better at, as I continue in my professional career.

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I think going hand in hand with that is I'm an explorer by nature. I really like listening to podcasts and e-books, and I like to read. I have a hard time getting myself to sit down and be still and read a book kind of thing, but I like to learn. So, I think being willing and able to learn is another skill. It's a pretty dangerous place to be in if you get to the point where you think you know everything there is to know, especially in a changing world. We just talked about technology entering the space and things changing. If you're not changing with it, that's not good for anyone.

Jean: I couldn't agree more. I think we need to be learning our entire lives. Otherwise, things get pretty boring and then you're not relevant if you're stuck in the same spot.

Korby: Yes. It would be a pretty boring world if nothing ever changed. It's all about keeping up — not with the Joneses, but about trends and best practices, and how you can further your career and yourself.

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Jean: How can marketers gain more power within their firms, or be more influential?

Korby: I think there are several things that go into this, and it's not “check the box” and you're there. Unfortunately, that's something that's going to take some time and effort. One of the first things that comes to mind is you have to be effective at communicating and in that, your relationships will come to fruition. You have to have good, strong relationships with the stakeholders within your company from all levels of the organization. We have about 180 employees and I don't know all of them super well. But something kind of cool about my current role is that, if we hire somebody new, I might get to reach out and introduce myself and say, "Hey, I'm Korby. I'm the marketing person in the firm. Can I get some information about you to write up a bio, for the rest of the firm to get to know you, that we post on our intranet?"

That's a pretty cool place to be in, to be able to be on the front lines of introducing somebody new to the firm, communicating their stuff out to all 13 of our offices. Another caveat for us is that we're super spread out, but then it's also the beginning of a relationship with people, too. If I call them in a month or two, they know who I am. Maybe they don't remember our conversation, but they at least have heard of me or our admin team.

Jean: You have an extra challenge there, Korby, because you're with a sizeable firm with 13 offices. When you talk about relationships and communication and being able to listen, that's even more important given the structure of your firm.



Korby: We all spend a lot of time on Zoom. Web conferencing is our friend. It's a huge tool for us. Just being able to click a link and you can see each other, and you can talk, and you can get on the same page has been really powerful.

Jean: That's another way that we've changed doing business. I have to admit that, when I started my accounting marketing career, we did have telephones, thank goodness, but no computers, no email. I mean, not even to mention Zoom, I lived through the beginning and the end of fax machines. Now, as you say, we can press a button and have a face-to-face meeting together no matter how many miles apart we might be.

Korby: It's pretty amazing. There's another challenge that I think accounting marketers have, and it could be in other industries as well. Sometimes it's hard to paint a picture of what marketing is in 2019 or, as we head into 2020, there's a lot of marketing this and this, whatever it is, and super old school method. Being able to articulate what is cutting edge and where we should be spending our time is another piece that I think falls into it. It's certainly a delicate mix there. You're forming relationships with these people so you can't just say, "Well, you're wrong and here's what we're going to do." There's some tiptoeing that needs to go into there and that listening piece about hearing them out and asking the important questions about, "Well, tell me more about why we think we should be spending time on this initiative and not something else." So that kind of falls into several of the questions we've discussed.

Jean: I think part of what you're touching upon is the ability to gain the buy-in from the decision-makers.

Korby: Certainly. Marketing, in general, sometimes is viewed as an expense but it's certainly an investment in the firm, and it's crucial to driving change in firms. It's really interesting. Marketing is so much more than bringing in new business to the firm. There are things that committees that I sit on, and perspective that you can help others within your firm, or anyone from wherever you are. There are certainly things that you bring to the table in addition to being able to help people sell something and bring in new business to the firm.

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Jean: Tell us your best piece of advice for accounting marketers.

Korby: I have two thoughts. First, I think this is something my manager told me when I first started here. You have to be your own biggest fan in accounting marketing. I'm a team of one currently. Certainly, I have people that I like to talk to at work. We do



different things, but I certainly have a family of co-workers that I can fall back on and share stories with. Marketing plays a crucial role in the firm. If you're not sharing your successes it's likely that nobody else knows about them.

It's less about saying, "Hey, Korby's awesome." It's more about, "Here are the things we're doing to advance the firm." Communicating them in a way that gives everyone some buy-in. I'm going to give everyone some perspective rather than, "Korby wrote this really awesome article." It's not about that. It's about how you are communicating what it is you're doing. That question or that comment you made earlier about, "Well, he looks busy, but what's he working on?"

Accounting marketers don't have a shortage of things to work on. I joked with my managing partner about some of our accountants being in off-season now that it's not tax season. He made a joke that, "You know, you probably don't have to look very hard for work." I was like, "Yeah, you know, I don't really look for it, the work finds me."

The second piece of advice, and this really falls in line with AAM Summit, is you have to, whether you're a team of one person or you have an army of marketing professionals at your firm, build a team or a support network of people that you can bounce around ideas with. I think that's maybe the number one coolest thing about AAM Summit. I hadn't been before and I met some awesome people who know exactly what I'm working on.

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They get me, they get what it is, and they all have insight into, "You know what, have you thought about doing this instead of that?" Some of those best practices that you don't always know as you're sitting in your office trying to get your work done. The insight and the expertise that's available through those professional associations like AAM, it's usually powerful. Getting out there and meeting your peers, whether they're at your firm or somewhere else, people are super willing to help and share ideas. That's really powerful.

Our firm is also part of the [Leading Edge Alliance](#), or LEA, another good information sharing tool. Probably a little bit of a less robust marketing group than AAM. For example, at AAM Summit, LEA got together for a separate dinner one night. It was probably 15 or 20 of us getting to know each other and then sharing best practices and helping each other reach our goals and overcome challenges.

Jean: Those are two great examples and, what you mentioned about AAM, about meeting people and sharing ideas and people's willingness to give advice and share



examples. AAM has been like that from day one and you don't find that in every organization. I'm really proud to be a member of AAM and all the fantastic people that you meet. Just love them.

Okay, so our final...well, maybe our final question, I might sneak another one in here on you, Korby. What is your best piece of advice for managing partners?

Korby: I think it's a piece of advice that I give myself. I'll start by saying that we're really fortunate to have our managing partner. His name is [Brian Staats](#). He's in the room right next door to me. He gets to see a lot of me, whether he likes it or not.

Jean: That's good positioning, Korby. It's a great place to have your office.

Korby: He's always willing and able to hear you out. He'll tell you that he's not a marketer, but he's always willing to hear you out and give some perspective. So, the advice that I would have is the same advice I give myself. It's all about perspective. Go share your story and get the help where you need it. Listen to people, hear them out. There's truly an art to listening and being able to help move people forward.

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The second thing, marketers in general and accountants in general, are two very, very different breeds of people. I would encourage any managing partner to think of marketing as more than an expense and to think of it as an investment in the firm's reputation and financial health moving forward. It's truly an investment in moving the firm forward in reaching the goals that the firm has for itself.

Jean: Can I get an amen for that? I could not agree with you more. It absolutely is an investment. So, I am going to sneak one last question in on you, and maybe have a little fun with this. I mentioned earlier that you had joined your firm in December of 2016, so your first few months at ABBB were during tax season. What was that like for you? Here's your first job out of school. Give us a cliff note of what that experience was like.

Korby: Absolutely. I graduated, moved here, and then started right away. I was very fortunate to have a job lined up, or be extended to me, right at graduation time, kind of a sigh of relief there. January, February are a little bit less stressful, I would say, for the majority of the people on our team. March and April are certainly more stressful. I was very much in that new employee trance of, "What is going on?" in the first few months. Any new job, I think, it's hard to get your hands wrapped around. I think accounting marketing is a little bit more difficult too, just because it is a very different world altogether.



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In a word, I would say it was pretty special. I was trying to learn, and trying to ask questions, trying to get to know people all gearing into their busiest time of the year. On the other side of that, maybe it was a good way to get intertwined into the firm a little bit less. I didn't quite get thrown in headfirst. I could step in one foot at a time, and everyone was a little bit more tied up in their busiest time of the year.

Jean: Well, coincidentally, I also began my accounting marketing career in the month of December. I won't tell you what year that was because you probably weren't even born, but it was quite a while ago. Actually, it was at the end of 1985. I received so many warnings of, "Watch out, the tempers are going to flare, watch out for that." I thought, oh my goodness, what have I gotten myself into? So, given that information upfront, it wasn't anything like what anybody described to me. Of course, there were some tense times and you understood just how busy they were. But it was nothing like what they had described. I was pretty happy about that.

Korby: You were delighted.

Jean: Oh, absolutely. I was expecting fistfights in the hallway, or something based upon what people were telling me. I was fortunate and didn't see anything even remotely like that. Here I am still today, hasn't scared me away yet.

We've been talking today with Korby Boswell, the 2019 Rookie of the Year. Korby, congratulations again. Well done.

Korby: Thank you so much.



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