

A Capstone Conversation With Mitch Reno



Principal and Director of Client Experience
Rehmann



CAPSTONE MARKETING

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Hello everybody, this is [Jean Caragher](#), President of [Capstone Marketing](#). Each year the Association for Accounting Marketing Board of Directors selects a [Hall of Fame](#) recipient based on dedication to, and promotion of, the discipline of accounting marketing and the accounting profession as a whole.

I am thrilled to be here today with my friend, [Mitch Reno](#), who is a Principal and Director of Client Experience for Rehmann. A lot of you know Mitch Reno. He is a longtime member of AAM, a member of the AAM Board of Directors from 2015 to 2019, and the 2006 Marketer of the Year. Mitch played a leading role in mapping out AAM's 2020 strategic plan. And, I believe, you are keeping that role for the 2025 strategic plan, Mitch. Is that right?

Mitch: I am. I work as a facilitator of the strategic plan with the Association.

Jean: Wonderful. So, Mitch, being inducted into the AAM Hall of Fame, so well deserved. Congratulations. Tell me how you felt that day.

Mitch: Well, interestingly enough, I was surprised and, I'm not sure how all of that seemed to actually happen, but I was really humbled and honored by the whole thing. I have so many people that I look up to, that are members of the Hall of Fame, you included. It is, for me, just an incredible honor.

Jean: Well, again, it really is well deserved. And, with the unique presentation we had this year via Zoom, it didn't replace being live, but I thought it was really well done.

Mitch: I'll thank you, in part, for that, too. That's one of the reasons it was a real big surprise for me. I brought the production company to AAM, and introduced them, and was involved in some of the planning calls. The fact even that something didn't slip at the point was somewhat amazing.

Jean: That is amazing because it's easy to just forget they shouldn't be saying anything to you.

So, [you] knew that we're recording these Capstone Conversations because, in our COVID world and we've all gone virtual, we know the importance of video. Let me ask you how COVID, in the pandemic, is impacting the customer experience, because that really is now your focus these days.



Mitch: It is. For the last five years of my career I've been so immersed and focusing on how client experience becomes a key differentiator, both here at Rehmann and as we work with our clients, but I've worked with other firms around the country and spoken a lot about how I believe it's that next differentiator that firms need to focus on. It's really not about imitating anyone else; it's about defining that differentiated special experience that your organization can be known for. It's absolutely important to me.

When you ask about how has COVID really impacted that, frankly, I think it's been an absolutely incredible opportunity for our profession and accountants to be out there in a situation where they're desperately needed by clients. The situation itself is horrific, but our ability to respond as a profession, I watched it inside my firm, how aggressively we reached out to clients and were doing things repeatedly to make sure they were adjusting and getting ready for what was next.

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For me, as I look at that scenario with COVID, horrible scenario, but it really helped us elevate our game. I think, as CPAs, we were out there more often with our clients talking about issues that were important to them and bringing really important answers and advice to the table. Hopefully, that's going to continue. I've talked to a lot of firms, especially in the Top 50 firms in the country, and many of them had initiatives to make sure that their partners were out there talking to clients.

I also think, from the experience standpoint, it really helped us understand that we were a little bit more digitally and virtually focused and prepared than we thought. Firms were really quickly responding to the virtualization of their business, our workforces went remotely very quickly without much trouble at all, and we kept servicing clients effectively. In fact, many firms I've talked to have said they feel like, operationally and effectiveness-wise, things have actually improved with a remote workforce.

So, I think our clients are getting more and they're now already more comfortable working in this new virtual world, that we've talked about a lot. What's next and working, using technology more effectively. I'm really happy to say I think that the profession has really adapted quickly, and our clients are adapting with us.

Jean: That's so interesting you say that because, frankly, we were dumped into this situation with this pandemic. It is adjust and continue or you're really in a hole. I mean, the future of your firm is really unpredictable.

Mitch: Elimination is key. I think we all saw who was able to adapt in crisis, we saw who was able to step up and lead. It became very clear in our firms. And it wasn't necessarily



always the people that we thought it might be. We saw a lot of young leaders really stepping up, and getting out there, and taking care of clients. I've been at my firm, Rehmann, for 20 years now. I've watched a lot of these people come in, early in their careers, and grow through the firm to the level of principal. And gone through the training programs with them, to teach them how to work with clients more effectively, and to watch some of that come to life in their proactive behaviors and responding to what clients needed. That's very, very exciting.

Jean: It is. So, I think you've touched upon this next question already a little bit. During this whole experience, what have you learned about yourself or your firm? How has this challenge impacted you?

Mitch: So, for me— as we think about it, for the firm, the profession. For me, personally, I'm kind of surprised how much I am comfortable working in a remote office. I've always enjoyed being in an active environment and that type of thing. I was a little bit concerned that that would be problematic but, frankly, Zoom technologies and the other tools that we've been using really make me feel as connected, or more connected in many ways, with more people throughout the firm. And I think that's what we've really seen in our organization.

We've had a lot of people that always care and like to work together and, all of a sudden, because we're not on the road travelling, we're not going to conferences, we're not doing all these other things, getting together to meet is a lot easier. We quickly can do that and respond on a dime. We also can do that with clients. It's so easy now for us to get on the phone with a client, face-to-face, bring one or two other specialists and integrate younger staff members in those meetings and give them exposure to these client interactions where it wouldn't have been cost effective to do that in a different world. These advantages are, I think, pretty special.

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I also think that it's been sort of amazing to watch—and I saw it so closely in our firm, being on our Economic Response Task Force, and COVID Task Force, that we have inside the organization—that we were able to respond and develop product, and take it to market quickly. I think as a profession, as an industry, CPAs are not great at thinking about the need for product development and, in general, don't do it very quickly. We saw a lot of firms develop new innovative things, apps being developed and the marketplace quickly to help with the PPP process. It's just amazing things that people were taking to market quickly that, before, we would've talked about in meetings for six months before we would take the next step in doing something.



The power of focus, and creating essential priority, has empowered firms to realize how they should be operating in the future. That, instead of looking at growth and how to use the marketing and sales resources within the organization, instead of diminishing them across 25 different things, what if we narrow that focus? Just focus on really driving change, innovation, and impact in one area. Amazing what we could do. And for us, for example at Rehmann, we're a \$160M firm and, I think, in three months we delivered about \$3.5M in COVID-related services. We responded quickly, we were able to track it quickly, and that is still continuing to build now. In fact, that number may be a little bit outdated. Frankly, I've been impressed with our firm's, and other firms', ability to develop service solutions and take them to market.

Jean: I'm writing an article for the *AAM Minute* about product and service development. I have an example, a very strong example, from one of our AAM members on that very thing. So, you're right, there are firms out there doing an amazing job in rallying together. And this example I'm referring to is not just about developing that product, that package. It's who stepped up to do it, and to take that opportunity to show their leadership skills, and their willingness to dive in. And just do whatever it took to make it happen, which is what you were referencing before as well.

Let's take a step— a parallel step, because you've got a long history in marketing in accounting firms. What do you think is the most challenging part of marketing a CPA firm?

Mitch: It's probably, historically, been viewed as difficult just because marketing was not necessarily a respected department within the administrative function within firms. When I joined the profession 20 years ago, marketing wasn't necessarily something that a lot of people said, well, they should have a seat at the table. Well, I think that's changed dramatically now. So, I think marketing as a support function within an organization is moved into a strategic function in many, many ways. If you're a smaller firm and you're wondering, gosh, is that really appropriate for my marketing manager, or something, that to be involved in strategy? This is the time to challenge yourself and think, yeah, I need to have marketing at the table for these critical conversations and decisions.

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When I really look at the core of your question, I want to answer it in a really simple way that I think has dramatic, important impact for the profession. And, that is, I think the biggest challenge is data integrity. You're like, really Mitch, we have all these CPAs— they're so focused on all the details. They are, but most workflows at CPA firms don't have a lot of focus on building a database of the right types of information, that are



going to make marketing in a virtual, digital world in the future something that can catch on fire in an organization.

I still talk to organizations that don't have good contact lists of all of their clients' email addresses and phone numbers. Much less the integration of other data from their practice management system into their CRMs, much less into any of the psychographics about the relationship, but a lot of that's beginning to change. Firms must begin to adopt radical measures. Now, you just heard what I said: firms have to adopt radical . . .

Jean: Radical.

Mitch: . . . measures to beef up the quality of the data in their systems if they expect to compete in the future.

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Jean: Do you think that marketers understand that, and the partners are the problem, or is it a combination?

Mitch: I think the marketers know that they need it. They know the potential of having it, but it is one of these things that we have the silos that have been created, and what marketing should be doing, and what the technical staff should be doing. I've seen it in my firm where, for a few years marketing, you're in charge of really improving the client data. No, now it's in administration and professional support. You guys were like, you really need to take a hold of this and do a better job. IT, wait a minute, shouldn't you be able to fix this problem? At the end of the day, the people who are interacting with the clients need to own the information. Is it the partners? No, it's the whole technical staff.

When any associate within a CPA firm begins an engagement that they're working on, a job or a project with a client, they need to take ownership of trying to improve the quality of information we have warehoused about them in our CRM systems. That needs to be strategic and driven through operational execution, from the department heads on down most departments, to make it happen. To integrate that into their workflows to make sure we are improving the quality of data of every client, every year, in some strategic-specific way.

Jean: This is going to enable you to do all of the personalization, communication, and cross-selling, and all of that.

Mitch: Absolutely.

Jean: And it's not the lowly marketing coordinator's job to handle all of that.



Mitch: Yes. And here's the big challenge, Jean. When I talk to people in the profession, they'll say, oh our firm's too small, we can't do that. I'm like, no, are you kidding? This is the thing a small firm has the edge on. You guys can really take a hold of this and do a better job. Through the mergers that we've done in the past 20 years, I can tell you that the quality of data being downloaded [in] our systems has traditionally been far below par.

Jean: This is an area that all of us need to be paying attention to. Agreed. That's a great point, Mitch. Thank you.

Mitch: It's a little bit mundane. It's not nearly as sexy as some of the answers you might get on that question. But I tell you, if it's done in a radical intervention within a firm, within a five-year window, a firm could completely have a competitive advantage if they did it successfully.

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[data integrity] successfully.**

Jean: You're exactly right. Let's take a look back, say, about 10 years or so. What are the most relevant changes, or pertinent changes, that you've seen within accounting marketing?

Mitch: When I started 20 years ago, when I was 14, what was really interesting is that we were still living off of that focus on, well, we've got to produce quality work and we've got to start to specialize our practices, we've got to have SALT specialists, we've got to have somebody that works in, possibly, employee benefit plans, and really hone those specialization areas. I sort of saw the tail-end of that move into industry specialization. In the mid-2000s we were really revving up and getting better and better at industry specialization, so we saw all of that happen.

Then, I started to see this evolution of brand, where we really need to begin positioning our brand and building our reputation around this one firm, vision and structure as we go to market. We saw the evolution of specialization and industry segmentation, and then we still have to bring that firm together under one brand umbrella. So, for me, obviously, I think I've made the choice where I think the industry is going next—and I think it is client experience. I think that becomes that differentiator, when you can look at the client journey, and that client life cycle, and you can identify moments along that cycle that will create that differentiated experience that makes people go back and think, boy, when I work with Rehmann, it's different because of this, this, and this. And they can tell that story, and they can feel that experience. That builds that brand reputation in a different way and, hopefully, it delivers a level of value that has, what I believe, will be a higher price tag.



Jean: Could you take 45 seconds and give us your definition of client experience?

Mitch: Absolutely. For me, I think that client experience is both the perception and the outcomes of all of those moments across the client journey that equate to the value the client perceives in the relationship with you. It's just that simple. All the perceptions and the outcomes of the deliverables they get, all those moments that add up across that client journey, that's really what makes up the client experience.

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Jean: Wonderful, thank you. I know that we've read more, and we've seen more, about client experience. We know you're in this role, other colleagues have made that shift as well. It's going to be interesting to see the pace that firms take in recognizing client experience, and the knowledge that they need someone to lead that effort.

Mitch: I think you're right. And, it's going to mean something different to a lot of different firms, and I think that's okay. People want the final definition, well, I gave you mine. And, when I teach and coach on this, I give *Harvard Business Review* and *McKinsey*—I just give all of this. Different points of definition of what client experience is, because, for many organizations it is something different. And that's okay.

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Jean: Because each firm is going to have to define it . . .

Mitch: Exactly.

Jean: . . . in their own way and something that they—it's just like their brand. It has to be something that they can live.

Mitch. Yes, absolutely. I was at a partner meeting last week, and going through, and talking, with the partnership about client experience. For them, knowing that they get to define what those moments are going to be, and how they want to be different, and how they want to shape that experience, and where that might reside within their organization. I think it gave them a sense of relief that it didn't have to be checking 27 boxes of here's everything that's included in your client experience, if it's going to be a client experience program.



Jean: Here's another checklist for you to pull out. Now, I know you know a lot of accounting marketers. Can you drill down to maybe the one or two characteristics, that you see, that make these marketers successful?

Mitch: Yes. I'll begin with, because it's been 20 years, I think tenacity. I think that there has to be a lot of strength of character in coming into an organization that is made up of a group of practitioners that are highly educated, very good at what they do, but need to be that person that is really, in most cases, going to challenge paradigms and get them to think in different ways and outside the box. So, I think it requires a lot of tenacity to be able to survive within that environment.

I'd also say that, outside of tenacity, we might say business acumen. Some of the people that have really been able to soar in their careers as marketers within our profession were good at thinking like a business person. One of the problems that managing partners oftentimes have with their marketing folks would be, well, you're talking like a marketer. You're not talking to me like a business person who understands business issues. It's absolutely critical to begin to understand the business, the metrics of the business, and how it operates and runs, as well as how our clients' businesses run. That elevates the marketing strategy, it elevates how you go to market. And, as marketers, it really elevates the manner in which you're speaking to your clients and prospects.

Too often we get caught in the myriad of so many requests in marketing that you're just trying to get as much done as you can, versus getting the right things done in the right way.

It's absolutely critical to begin to understand the business, the metrics of the business, and how it operates and runs, as well as how our clients' businesses run.

Jean: And knowing how to pitch your ideas for the return on investment. You're making these suggestions, not because the firm down the block is doing it, or it might be really fun. These actually fit into a strategy.

Mitch: I love what you've said there, and I'll call them sales skills. We have to be tenacious. We have to have business acumen and bring that to the table. But, as marketers, we have to remember that we have to sell our ideas, we have to convince and persuade people to do probably new things that they're not comfortable with doing, accept new ideas that they're not comfortable with, and to try new things.

When I look back on my career, it wasn't the great idea that I borrowed from another firm that really separated Rehmann from others. It was things that we came up with, and innovated on our own, that other firms said, well, wow, we want to do it like that. It's hard to sell new and different when, as you know, Jean, in our industry every



managing partner says, well, tell me what 10 other CPA firms who did that, what their ROI was and maybe we can do it.

Jean: Yeah.

Mitch: I'm not going to tell you what 10 other firms did because we're going to be the first to do it.

Jean: Rehmann's going to be on the list, that the other firms are going to use, to try to sell it in their firms.

Mitch: That's right.

Jean: So, tell me which of your skills you think has contributed most to your personal success.

Mitch: When I think about the marketer's skills and, which of those, I think I've been fairly tenacious. I also, at the end of the day, have to believe that I'm a good relationship builder. With my internal customers I've always worked to understand them, to listen to them, understand their goals, work toward those goals and really be their advocate.

I've looked at my boss, and the Board of Directors, at the department heads, at partners within different offices— they're my customers. I've got to bring to the table an attitude that is really being a servant-leader. I've got to be a good servant, and I've got to lead them in an appropriate direction that helps guide them to the right outcomes. I've always tried to do that; I think I've done that fairly well. Always had some stumbling blocks, of course, but overall, I think I've done that well.

I wish I could say, Jean, I was just one of those people that work smart, but I wasn't always that person that works smart. Probably still am not. I may be a little bit better, but I've always worked hard. I don't know, I never worried about if I was working a 10- or 11-hour day, if I was passionate about a project. It was just a part of me, it was a fiber of my being. People would tease me about it, but I never felt like I was working too hard because I was loving what I was doing.

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Jean: Then, that's the difference right there.

Mitch: I think I heard something recently that somebody said, and it was a piece of advice they gave. I wish I could quote who it was. He said, you know what? Love what you do. Oh, it was a client. I was talking to one of our clients. At the end of the



interview, with a class of trainees, we asked the client, what advice do you have? And he said, love what you do because, as a client, when you are loving your job, and loving serving our business, I can see it. I can tell that that's the truth. So, find that. Find out what you love and do it.

Jean: That's great advice for all of us, absolutely. So, let me sign off with two quick questions, and it does revolve around advice. First, what would be your piece of advice for other accounting marketers or, perhaps, those that may be looking to shift into this client experience role?

Mitch: I'm not sure if it's just marketers, or businesspeople in general, managing partners, CEOs. My recommendation is quite simple: listen. We don't listen enough to our customers, we don't listen enough to our associates, and we don't take the information that we hear and really study and analyze it properly. Most of the answers are there.

We don't listen enough to our customers, we don't listen enough to our associates, and we don't take the information that we hear and really study and analyze it properly. Most of the answers are there.

If leaders within marketing departments, leaders within departments, and other segments within the organization would listen to clients more often, they would get every answer they need on how to serve them better. They would understand their niches better and they would feel like better advisors immediately. Clients, of course, love it. They absolutely love it.

At Rehmann, I'm going to out on a limb, Jean, and tell you we do more listening than—this is a shock— any other CPA firm on the planet. I have 5,000 completed surveys in the last two years.

I have more data and feedback from our client base and the power of that, collectively and individually, and how we're able to respond, and the choices we're able to make that are client-centric, really are profound. So, if we just start listening more effectively. If I could go back 20 years ago and do as much listening as a new marketing director as I do now. I talked to nine clients this week for about 20 minutes and I learned three great things that we need to do. I've already reached out to our digital analytics person, that works with the audit team, to work on a quick project that we can fix what was going to, I think, be a great improvement in how we deliver service for our teams and our clients' ease of doing business. If we listen closely enough, they're going to whisper the answers right into our ears.

Jean: I think that is a wonderful point to end on today; the importance of listening and the fact that all of us need to listen more frequently.



We've been talking today with Mitch Reno, Principal and Director of Client Experience at Rehmann, and one of the newest inductees into the AAM Hall of Fame. Mitch, congratulations again. Well done. I really appreciate your time today.

Mitch: Well, thank you, Jean. Love being here and thanks for asking me.

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