

A Capstone Conversation With Lauren Clemmer



Former Executive Director
Association for Accounting Marketing (AAM)



CAPSTONE MARKETING

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Hi everybody, this is [Jean Caragher](#), President of [Capstone Marketing](#). Each year the AAM Board of Directors selects an inductee into the [AAM Hall of Fame](#). This person has shown a dedication to and promotion of the accounting profession, has been long-tenured in the profession, and a member of the [Association for Accounting Marketing](#).

I am delighted today to be talking to one of the most recent inductees, [Lauren Clemmer](#). Many of you know Lauren as AAM's Executive Director, a role she held for four years. Prior to that she was the marketing manager at Ciuni & Panichi, where she was for eight years, so Lauren has a solid background in accounting marketing. And, prior to entering our world, she held senior marketing positions in corporate America and technology. So, let's welcome Lauren Clemmer. Lauren, congratulations.

Lauren: Thank you, Jean. It's my pleasure to be here.

Jean: We were talking earlier about the ceremony. And your adorable husband came in the room to give you the trophy, and had the white gloves, and the tray, and the whole thing. What were you thinking when that was going on?

Lauren: I was beside myself because normally, when I do these calls, I try to keep him out of the room. I locked the door, and he had to pick the lock to actually get in where I was. I gave him a dirty look at first and then realized what was going on.

Jean: You figured you'd let him stay in.

Lauren: Yeah, I guess I'd have to keep him.

Jean: That's awesome.

Lauren: Well he was all dressed up and, I'm going, why are you... oh.

Jean: I'm really happy that it was a surprise because I always get a kick out of people's reactions. That was a classic from you, that was wonderful.

Lauren, I usually start off these conversations asking about the biggest challenges of marketing CPA firms. Given your experience, both working internally and what you could observe from being AAM's Executive Director, what's the biggest challenge?



Lauren: I think it's developing a relationship with the partners and understanding how an accounting firm works. I came from a whole different industry, and it took me awhile to understand how to communicate with my partners so that they didn't look at me, when I was presenting ideas, that I had three hats. I think that's one of the greatest challenges.

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Jean: Can you expand on that a little bit? I know a lot of people will relate to this, that one of the challenges marketers may have is to express their ideas or make that pitch for a particular strategy or campaign.

Lauren: What I did was, I was so frustrated, and I had met with the partner that I reported to at the time, consultants that worked in the area of leadership and things of that nature. I went back to them, and they offered a consulting package where they would work with you monthly and, kind of, like the work that you do. I just decided that's what I needed. I needed to understand my personality versus their personality, and how to communicate, because I just felt like I was hitting a brick wall and I needed to figure that out.

I had this really, wonderful coach— executive coach— that I worked with. What I did is, I went to the firm and I said, look it wasn't cheap, I presented the idea and I didn't ask them to pay for the whole thing. I said I'll pay for half, would you pay for half, so that they knew I was really committed to this and I was all in; this wasn't just a whim. It helped me immeasurably in that Vic helped me understand how an accountant thinks, and how they need to be presented an idea, as opposed to the way I would normally throw an idea out there and not understand why they couldn't understand it.

It was a matter of they prefer to see it, digest it, and then talk about it. That made a huge difference. In fact, they were so impressed that, the second year, there was no issue with continuing on with the program. Although, at that point, they had actually brought in a senior person, who was formerly the president of the United Way here in Cleveland, and he became my mentor. So, I didn't feel I needed the executive coach anymore because Mike then became—was kind of like the next step for me.

Jean: That's wonderful, because I think a lot of us can learn how we can communicate with each other. I know firms have gone through different sorts of personality testing — there's the Myers Briggs, and all those different ones – if you have some information in advance you know how they want to receive communication from you, and how they make decisions. We all know those accountants like to have their information.

Lauren: They want data.



Jean: Yes.

Lauren: They want, and they need, data. And, if you can give them data, or at least paint the picture for them, do it on paper. Give them something tangible that they can look at and digest. It makes a huge difference.

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That, coupled with people I met and became friends with, like you and AAM, helped me work my way through it and grow as an accounting marketer.

Jean: Well, it worked because you were with the firm for eight years. So, that's a long tenure.

Lauren: I can tell you, a year in, I was looking for another job because I don't think this is going to work. And, then 2008 hit and there was no moving because of the recession and everything. AAM is what helped me stay with Ciuni for eight years; because of people I would have conversations with, and work through problems with. The people of AAM are such a giving and loving group that you could talk to anybody about anything, and they would share things they had done. In fact, we implemented a marketing points program that came from Anders. And she was so helpful to me in explaining what they had done and how they had implemented it. It became a core thing at Ciuni that helped us transition the firm and the culture.

Jean: Wonderful, that's awesome. I agree completely with you about AAM, we both know that. So, think about a 10-year time frame, 10 years ago until now. What are the biggest changes that you've seen?

Lauren: I think the biggest change, and I know it's not across the board, but I think marketers overall are gaining more respect and are certainly moving into power positions. In the partner positions, or maybe non-equity roles, but high levels in their firms that wasn't necessarily the case when I first started. Also, the other thing I will say is, I think the tenure of the marketer is longer than when I first started.

Jean: Yes.

Lauren: Because things have changed.

Jean: I agree with you.



Lauren: We have more respect within the firms, generally speaking.

Jean: I agree with you completely, on both fronts. It is much different from when I started. I tell this story sometimes. When I moved from Long Island to Atlanta— so I had four years' experience at a CPA firm on Long Island – I moved to Atlanta to this local firm. My first day, I walk into my office, and there's an article waiting for me on my desk from an old PDI publication with the headline that the average tenure of accounting firm marketers was 11 months.

Lauren: Oh, Lord.

Jean: I had moved my life from Long Island to Atlanta and that was what greeted me on my first day. And, I thought, oh my gosh, what I have I gotten myself into? Ironically, I was there about eight.

Lauren: Oh really?

Jean: That's when I got my position at BDO.

Lauren: Okay.

Jean: I always viewed that first Atlanta firm as the segue for me to be able to make that geographic move. Then, BDO was a different ballgame altogether. We have gained a lot more authority and respect. When I ask this question, I usually get a lot of feedback also about digital and social, and the different ways that marketers can promote their firms, and create their marketing campaigns.

Lauren: Well, particularly now. Particularly now, in a pandemic, where you may not be in front of the client as much, it's a great opportunity to get your name out there and what your firm is capable of.

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Jean: Lots of people having to remove live networking programs, and seminars and things like that, and trying to translate that into virtual.

Lauren: Absolutely.

Jean: You know a ton of accounting marketers. Do you find a theme in the skills or traits they have that make them successful in their roles?



Lauren: I think the theme is having a level of confidence, confident in yourself and your abilities and being able to translate that to the firm. A partnership is not an easy thing to step into because those folks own that. If they're not a BDO and, a firm my size, they own that firm, and that's money out of their pockets. And, sometimes, it's a little more difficult to wrestle that money away from them because it is their money. You need a level of confidence in yourself and what you're presenting to be able to succeed, and I see that in the people who have been successful.

Jean: Anything else that you noticed? I agree completely about the confidence.

Lauren: Being thoughtful in what you present. In other words, really doing your research, understanding your firm and your market. I think this is what's difficult for all of us is helping to make our firms stand out. Finding that one thing that may be, it could simply be personality, that helps your firm stand out.

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Jean: That differentiation factor.

Lauren: Correct, yes.

Jean: We just hosted a webinar about that just a couple of days ago and, also, for the business development group. It's still such a big area because a lot of firms do look the same. There are firms out there that we both know that really have done an excellent job in telling their story and setting those expectations for clients ... for that matter.

Lauren: This is kind of going back to the previous question, but kind of relates to this, is that you now have business developers in many firms that 10 years ago you didn't necessarily. Or mine, who said 'well, we tried it and it didn't work'. You have where they just—they can't seem to get beyond that.

Jean: How often do you think when CPAs say that 'oh we tried it and it didn't work', what sort of effort do you think they really made? I think sometimes, in a way, they're happy that it didn't work, because they could just go back then and continue doing things how they always did them.

Lauren: I think that happens more often than not. Particularly, mainly I think, in the smaller firms where they just don't have a reference point. The thing I found was, if you can reference another firm of equal size and stature that's doing things differently, you might have a stand on to give them the data they need and the confidence they need to be able to do things differently.



Jean: Absolutely, because they love the evidence. So, which of your personal skills has contributed the most to your success?

Lauren: Collaboration. I prefer to sit back, and listen, and take advantage of the people around me that can bring things to the table, which is why I think I was successful in my role at AAM. It's funny because, when I first started, one of the Board members said to me, "Well, I expected you to lead." I was like, well, but I'm trying to understand the landscape, where the issues are, and how we can address them, and then bring the right people to the table to make it work. I'm very much a let's take advantage of the resources, because I don't feel like I'm the smartest person in the room many times. I learned so much from others.

Jean: I think all of us have learned from each other. Nobody knows it all, Lauren.

Lauren: Oh gosh, no.

Jean: We know a lot of smart people, but nobody knows everything. So, if you could give a piece of advice to accounting marketers, what would that be?

Lauren: Believe in yourself, believe in what you bring to the table, but be flexible. You have to be flexible— don't be intractable, don't be angry. Listen and try. I felt like that's what I did where I knew I wasn't getting my message across so I went to somebody that could help me figure that out. Don't be afraid to use your resources or ask other people and take advantage of what AAM has to offer.

The other thing I would say is get involved in AAM because being a member is one thing, but when you get involved—one of the first people I met when I initially joined was Katie Tolin. Katie said to me, my managing partner told me to get involved. I am saying to you, you should get involved. And I did, and it made all the difference in the world.

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Jean: In a big way.

Lauren: Well, because you get to meet other people and you build a network that way. You'll get to understand the Association and how it works.

Jean: I also think – tagging onto what you were saying about advice for marketers not to be angry – I think what relates to that, is that marketers also need to accept when an idea isn't approved, or the firm partners aren't too excited about one of their ideas. Not all of it is going to stick, so there has to be that give and take.

Lauren: Yes. A good example for me was when I went to a session when we first co-located with the AICPA. I was in a session with a managing partner who was presenting



an idea from a firm here locally and, I thought to myself, my leadership is not that leadership and will never be that. I need to accept that, and understand who we are, and how we operate, and what's best for us. I can want it all day long, but we're never going to— that's not who we are.

Jean: I think that's an excellent lesson. It does go back to working with your resources and understanding what you're going to be able to accomplish and what you're not going to be able to accomplish.

Lauren: Yes, absolutely. You can want to— you can see somebody's else's work and think, oh gosh, I wish we could do that. But wishing doesn't make it so and, sometimes, you have to sit back and look at your leadership, and the culture of the firm, and understand what you can accomplish.

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Jean: That's a great point. So, on the flipside, what piece of advice would you give to firm managing partners?

Lauren: I would say, listen to your marketer because they do bring a wealth of information. Partner with them, because I think a partnership is going to gain you a lot of, especially in today's market, and the way things are. I think a marketer can help expand your world view. Believe that marketing can make a difference, because I'm not sure all firms still believe that. If you look around the firms that have embraced it, have really gained a lot more, because they're able to get their message out and be more noticed.

Jean: That's great advice because accounting is a business. We refer to the accounting profession, but these firms are running businesses, and marketing is an integral part of any business.

Lauren: I was fortunate because I was considered part of the management team and participated in management meetings. That's really important too, so make sure you're including them in your planning, because they can really shed some light and have a voice. You can choose to follow their advice, or not, but at least listen.

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Jean: Absolutely. Well, we've been talking today with Lauren Clemmer, AAM's former Executive Director and one of the most recent inductees into the AAM Hall of Fame. Lauren, congratulations again. It's so well deserved, and we appreciate your time today.



Lauren: Thank you so much. It was my pleasure. Thank you for reaching out to me, Jean. This is delightful.

Jean: You're welcome. We'll talk again soon.

Lauren: Thank you so much.

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