

# A Capstone Conversation With Sarah Cirelli



Chief Marketing Officer  
Grassi Advisors & Accountants



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), president of [Capstone Marketing](#). I am excited today to be talking with [Sarah Cirelli](#), Chief Marketing Officer for [Grassi Advisors & Accountants](#), who was recently named the [Association for Accounting Marketing](#) 2021 [Marketer of the Year](#).

Sarah manages a team of eight experienced marketers who execute marketing, advertising, communications, public relations, practice growth, and business development initiatives on behalf of the firm's more than 350 employees. I could spend the rest of our time together talking about Sarah's accomplishments, so I'll share the one that I believe makes her the proudest. Sarah, I believe that is your SWAT workbook because you've talked to me about this before. SWAT stands for special weapons and tactics. It's an automated tool that holds all of the firm's crisis response and recovery services marketing data. That's every person who attended a webinar, called into their hotline, the questions they asked, the industry they operate in, and where they were in the lead generation process all rolled out into a dashboard. I understand that this SWAT initiative resulted in nearly \$2 million in ROI. So, Sarah.

**Sarah:** Thank you. I'm really proud of this. We are.

**Jean:** You told me you were.

**Sarah:** It's funny. I feel like the last time we spoke about it, we weren't quite sure how impactful it would really be, and it's evolved so much since then, but this...oh man, we love this thing. We really do.

**Jean:** Wonderful. You should be very proud of that. Sarah, congratulations on being named the 2021 Marketer of the Year.

**Sarah:** Thank you.

**Jean:** I know you were able to receive this live because you were at Summit. Did you know in advance?

**Sarah:** I don't know if I'm supposed to say, but they did tell me. They did tell me in advance. They did reach out. It felt so good to be in person. Oh, man. I think that you know, we were local. They wanted us to have a chance to invite Louis, our CEO, and some others and be there to celebrate in person. It was really nice. It was really nice to see everyone. I didn't, you know, I knew I missed it, but I didn't realize how much I missed seeing everyone until I got there. There's just nothing like in-person. It was my first experience, too, with a really thorough hybrid event. I can't imagine how hard that was to pull together, but so great to be there in person. And, it's such an honor, too.

**Jean:** I'm very much looking forward to the Summit in Louisville next year because, for sure, we're going to be past everything by then.

**Sarah:** Yes.

**Jean:** Sarah, tell us what is the biggest change that you made to your marketing program due to COVID and as a follow-up, which change do you think will continue post-pandemic?

**Sarah:** Wow. It's amazing to think how much the pandemic has changed everything in relation to how we do business. I think one thing in particular that we did really well was our pivot in strategy, period, and how we managed that pivot. You know, Jean, for as terrible as the pandemic was for us and so many people, it was also some of the most fun that I've ever had in my career. It was so exciting. You know when March hit last year, we completely pivoted our go-to-market strategy.

**“We had to take a step back and really anticipate what services and offerings we believed our clients would need to survive, let alone to grow.”**

I always knew the importance of that outside-in mentality in terms of letting the market dictate what services, offerings that we're bringing to market and what we believe to be needed, and how best to communicate and market those, but there was no better example than this past year. We had to completely abandon what we were doing for our strategy and our plan as we knew it. We had to take a step back and really anticipate what services and offerings we believed our clients would need to survive, let alone to grow. We took that very seriously. So, it was a really solid lesson in that outside-in mentality and not just putting out there what we believe to be the best. Right? What is the market dictating and that effort in understanding what that is? I also learned a really valuable lesson in moving quickly. So, I think sometimes, I don't know if you can relate, but we often get paralyzed by our need to do everything perfectly and right. So, one thing we did was...

**Jean:** Sometimes we just need to let it go when it's good enough, right?

**Sarah:** I know. I know. Looking at things as progress instead of just waiting until it's perfect to put it out there and let others see it and enjoy it. We learned a really valuable lesson in doing things quickly. We moved fast. We moved faster than we usually did. There were oftentimes we were putting invitations out into the marketplace for a webinar taking place 48 hours later, where we had no idea what we were even going to say yet. Where we still had to go through the 100-page document to understand what the heck it is. We moved quickly and I think there's really something to that and the crisis response and recovery hotline that you referenced, we pulled up together in a day and without really having a solid and formal process. We wanted to just make ourselves available. We said we'll figure it out however it unfolds. That lesson in moving quickly, I think, was something really great, too. I think two very valuable lessons that I'd like to continue and hold onto moving forward.

**Jean:** I think it also shows us what we're able to do in a crisis.

**Sarah:** Yeah. You know what, that's true, too. You start to discover a lot of the undiscovered talent around you when your backs are against the wall and your resources might be more limited than you want them to be. That excitement generates new opportunities and yeah, I totally agree, Jean.

**Jean:** You've talked a little bit already about what you've learned about yourself. Have you learned something different about the firm and the firm's reaction to all of this with the pandemic?

**“We focused almost entirely on creating great content, simple content, quickly putting it out into the marketplace through webinars or alerts, building that SWAT tool, and then nurturing and building out those leads and pursuing those leads with our people.”**

**Sarah:** You know, it taught me, I think quite a bit on how successful I can be personally when I narrow my focus on one or two really impactful initiatives. I know you know this already about me, but I tend to be very excitable about a lot of things. I get very excited about most things and I love everything and it sounds good, but it can make focusing very challenging. That's not something that comes easily to me. I've had to really develop my productivity skills and my focus skills. The one book that I always say, "The One Thing", it's like my Bible. It teaches you how to be productive. It's made for people like me who just had “ooh shiny” disease and they're all over the place. One thing, again, that I learned last year through all of this, we really narrowed our focus on what we were working on. We said no to a lot of stuff that we normally would have said yes to. We focused almost entirely on creating great content, simple content, quickly putting it out into the marketplace through webinars or alerts, building that SWAT tool, and then nurturing and building out those leads and pursuing those leads with our people. Normally, we'd be like researching the best podcast tool, and doing all these things. We really narrowed our focus. It's taught me a lot.

**Jean:** I think that's a great lesson for everybody because I always pride myself on being able to get things done, but I do have to remind myself of that focus of, okay, I've worked for a bit on this now let's spend some time on this when I really should just keep spending time on that first thing. Right?

**Sarah:** I'm with ya.

**Jean:** Getting that done and then get to the next thing.

**Sarah:** It's also hard, too, because I love my peer groups. I love [AAM](#). I love [Moore Global](#) and there are some, oh my God, there's some talented accounting marketers out there. I love watching everyone. It's easy to feel envious when you see another firm or another marketing department with a bigger budget or a bigger team or different tools. It can sometimes be a little discouraging if you don't have those things and you think you can't achieve the same success, but we learned it's great to be inspired by other firms. Everybody has got different needs and different geographic factors and different industries of focus.

You don't need to be discouraged. I feel like you don't need to have 25 of the newest and hottest pieces of technology to be successful. Technology is supposed to make things easier, not more complicated. Everything that we did this past year was with everything that you could already find in your fridge, right? We used Excel, we used Teams, we used our website. I learned you can do a lot with a little bit, and it was nice to learn that.

**Jean:** You know what Sarah, there might be firms out there that do have other tools or things that they use, or you think that they use, but there's always a story behind that about how well it's actually working or not. Right? I think that's the message of use what you have and become really efficient at using those tools. There was a stat, I'm not going to remember it now, but how little...I want to say it's on average people learn about 20% of the Microsoft Suite. People learn just enough to be dangerous with Word and Excel and PowerPoint and they don't know 80% on the other half of what it can do.

**Sarah:** That's so funny you said that. In my mind, when I was just speaking to you, some of that undiscovered talent that we found around us. Somebody who works with us was able to use Excel in a way where it was very similar to power BI. What he was able to do in Excel, it didn't feel like Excel anymore. And I'm like, where are they teaching the... I did not learn any of that. It's amazing.

**Jean:** Exactly. So, let's step off the pandemic a little bit. Overall, what have you found to be the greatest challenge in marketing CPA firms?

**“There's an incredible amount of pressure to keep innovating as our profession changes quickly.”**

**Sarah:** There's an incredible amount of pressure to keep innovating as our profession changes quickly. Just as an accounting and consulting firm, being at the forefront of continuously innovating and specializing and creating competitive offerings, bringing them to market, creating offerings that are competitive in price with technology and automation. Then, how do you even begin to put it out into the universe with social media being so saturated and with there being so much noise online. Once you get to your target, how do you connect your message and how do you really breakthrough? I feel like that just keeps getting harder. It's not impossible, but it keeps getting harder. Creating offerings, bringing them to market, making them unique, making them attractive, communicating effectively, with so much noise. I think that's it. It's like an easy answer, but it's so hard to do. Then, talent. I feel like consistently bringing onboard new talent and interesting talent is a challenge. It's constantly on my mind. I'm sure it's on yours, too.

**Jean:** I think especially with the market you're in, being in New York, New Jersey, all that.

**Sarah:** There are so many good firms around. There are too many. I know there are, you're right.

**Jean:** I think every market feels that same thing, what you were just saying, but the bigger markets it's exponential. It's just that much more of a challenge for you.

**Sarah:** As an accounting marketer, too, how do you continue to learn what tools are available? How do you decide which pieces to automate, and which actual warm bodies to bring into your department? How do you justify either one and continuously advocating for a larger budget, improving ROI on everything that we do? And it's tricky. It's fun, but it's tricky.

**Jean:** What changes have you noticed in accounting marketing over the last 10 years?

**“I feel like marketing has proven such a direct and positive impact on practice growth and culture and revenue. We've truly joined the top ranks of leadership and strategy within firms.”**

**Sarah:** I feel like marketing has truly earned an incredible amount of respect within accounting firms. We've become such a vital part of the core leadership and core strategy where I don't know that that was always the case. I mean, take [Eric Majchrzak](#) for example. Of course, I'll work him into any conversation. Coming on board as CEO, managing partner of BeachFleischman. Oh my God, did he earn that? That's amazing as our entire industry is like, that is totally possible. And, it is. I feel like marketing has proven such a direct and positive impact on practice growth and culture and revenue. We've truly joined the top ranks of leadership and strategy within firms. We're trusted and we're valued and I'm so grateful that that has been my experience. I hope that's the experience for most of us not for all of us yet. I know that that's where we're trending. I think, at least the conversations I'm having, accounting marketers, we know our value now. Right? We're trying more and we're asking for more. We're trying things and failing. We're demanding to be involved and we're earning our right to be there. It's becoming more and more competitive, which is so fun. That increased level of respect among the leadership within our firms is like, wow.

**Jean:** That just warms my heart more than you know. I can see it, too. I'm so proud of Eric. It is so well-deserved for him, but I guess I could keep focusing on this pandemic. There's nothing like a crisis to really wake people up and realize, oh, that marketing department, they're working hard. Look at what you were just saying before about that concept of focus on the content and the webinars and the programs and all of that. Firms can't do that without a marketing department.

**Sarah:** No way. I think marketing really stepped up during this pandemic, too. We really stepped up. That fear, that heightened sense of uncertainty, it debilitated a lot of people, but I feel like the accounting marketers, it motivated us. It really did. I've heard so many stories from our peers about how we stepped up and how everybody stepped up. It was the best to hear that and all the surveys we've taken. I've heard that. They've done more and better and I'm like, hell yeah, that's awesome.



**Jean:** It's very exciting because, another thing I see, back in the old days, it used to be marketers would work for an accounting firm or a law firm if they couldn't get a real marketing job somewhere else like in a corporation or an agency or something like that. Now, I believe marketers can look to a career in professional services marketing, that they can have a career path within firms to be successful and grow and become leaders, and do all of these things that we've been talking about.

**Sarah:** That's so true. I can remember coming out of college, getting the internship with Withum. Me telling my friends, my marketing friends, I'm like an accounting firm. But now shame on me, right? I would never answer like that, but at that time it felt a little like that, felt a little like, can you update this PowerPoint? And not anymore.

**Jean:** Yeah. Can you order lunch? Can you arrange this party? Can you get these promotional items?

**Sarah:** Yeah.

**Jean:** I think you've also been fortunate, Sarah, to be within firms who are forward-thinking and enable their marketers to really do what they're capable of doing.

**Sarah:** Grateful every day. Yeah, absolutely.

**Jean:** Tell me, what do you think is the factor or skill that you have that contributes to your success?

**“I also am really interested in the psychology of humans and why people do what they do.”**

**Sarah:** I think it's probably mostly attitude-based. I try and have a generally good attitude. I have totally had my meltdowns, but I at least space them out far enough where I can keep going pretty steadily. I really do try and have a great positive attitude about most things. I really do like to try weird things and it's okay if you fail and I'll try again. I also am really interested in the psychology of humans and why people do what they do. I probably, Jean, read more about human behavior than I do about marketing. I just am a total nerd when it comes to what motivates people to do what they do. I really, really enjoy that and that has come in handy more than I will tell you.

**Jean:** I bet.

**Sarah:** Understanding different personalities and how to motivate them really comes in handy. I think I do a pretty good job at that and also fostering internal relationships within the firm. I try and be good at using the same set of skills, of course, and I try and teach our team that, as well. It's a really good idea to foster those internal relationships with key people to move initiatives forward, the heads of finance, heads of legal, operational leaders, anybody who's going to sign the check on whatever it is we're trying to buy. There's

value in that. I keep up on my craft, of course, but if I had to put it on my two marketing skills or those other things, I might go the other way.

**Jean:** Interesting. That's definitely true because everybody has their own internal thinking and the way they do things, to be able to understand that better or understand their personalities better perhaps.

**Sarah:** It helps you get in the minds of the buyers too. When you're crafting your marketing content, you're speaking in such a way to certain human characteristics. When somebody buys one of our services, they don't buy one of our services because they need one of our services. They're buying one of our services because they need to protect something or they want to be competitive in an area to look good in front of their peers, you know? If you understand and dig at that level, wow, the power that's in that. We try to leverage that.

**“They're buying one of our services because they need to protect something or they want to be competitive in an area to look good in front of their peers.”**

**Jean:** I think you just said a very important thing. I know you've met many talented marketers; you've referenced about them before. Do you see any commonalities in their skills or talents that you feel have made them successful?

**Sarah:** There are some really creative firms out there. Too many to name right now, but every time... That's what I love the most, honestly, about the peer groups. Anytime we get a chance to get together and hearing experiences and the most successful people that I talk to are really just not afraid to try something different. They're good at getting inspiration from outside our industry, too, and trying something. They don't mind being the first person to test it out and not abandoning entirely if it doesn't work, but then changing it. Another person I love that I mention all the time as [Lori Colvin](#) from [Armanino](#). She's a saint and she's so freaking good at what she does and her team and she get on the phone with me anytime I want to talk something out. They do such an amazing job out there. I love that in a professional, somebody who is willing to try something new and learn from it, share their lessons with others, too. Those who are willing to leverage peer relationships, I think they get a lot out of that, as well. I do, for sure.

**Jean:** Absolutely. What is your best piece of advice for accounting marketers?

**Sarah:** To do whatever you can to get yourself into those high-level conversations within the firm. Understanding the goals of the firm very clearly, having access to those conversations, ask as many questions as you can. The more we can do that, the better we can align whatever it is we're working on with the end goal and actually have an impact. If you're not there ask to be there, not wait to be asked. Ask to be there. If they say no, get the heck out of there, or really make a case for it. The more clearly you understand at that level, even the challenges, the problems, the issues, the goals, the better you can align the efforts. The better you're spending your resources, the more ROI you're going to see, the



more successful you're going to be, the happier everybody's going to be. That was the best thing that I really ever did was I asked to be involved. If I couldn't sit in on the actual meeting, I asked for notes or I asked for anything relevant for me to know. I really did that and I do that even now sometimes. It's important. That would be some of my biggest and best advice.

**Jean:** Let me ask you an unplanned question. Your managing partner, [Louis Grassi](#), said he appreciates that you aren't afraid to challenge his ideas if you feel you have a better solution. Tell us your approach to presenting those alternative ideas.

**Sarah:** I love Louis, but he can be super intimidating. He's very New York but again, Jean, it comes down to understanding Louis and what motivates him and how to position the ask, in favor of what motivates him and understanding why he feels the way that he feels. Thank God Louis is as tough as he is. He's got 350 families that he's responsible for every day, every decision... I can't imagine what that must feel like. Every decision you make ultimately decides the course of the ship and that's a lot of pressure. I feel for him.

**“We're not going to blow it up, we just want to take what you've built for 40 years and enhance it so more people see it and more people like it and more people can understand it.”**

I am also very mindful about the things that I'm saying to him because I feel that same pressure and I absorb some of that pressure. I use branding as an example for this. When we decided to rebrand, Grassi had been about a 40-year brand at that time. I had heard that there were some folks in my shoes sooner who had approached the idea of branding and it was shot down. I thought to myself and I said, I can understand why somebody who has spent 40 years building a brand would feel some type of way about changing it. There's a legacy there. So, when I approached that conversation, I was ready to tell him, we're not going to change it. We're not going to blow it up, we just want to take what you've built for 40 years and enhance it so more people see it and more people like it and more people can understand it. You have access to sharing your legacy with more people. I came prepared with the prototypes of what it might look like to take that fear away from him. When I talked to Louis, I'm quick. He's got six meetings and one is in three minutes and it's like, you got to... It took me a long time to learn how to do that. That's how I try. It scares me, just scares me every time I have a different opinion than Louis but...

**Jean:** But have the courage to do that. That's a great lesson because, obviously, he respects what you have to say. Otherwise, you wouldn't be in the position that you're in. Also, I think what was one aspect of what you just said, it is so important to know the person like you were talking about before and the best way that person's going to receive that message. You're telling me that you're doing your homework ahead of time. You're anticipating the questions he's going to ask you. In the branding example, you had some examples of what this might look like. You were prepared.

**Sarah:** Yeah. There are even...I've heard...the name escapes me now. I'll have to find it again. There are even tools, like extensions, that will connect to LinkedIn and run these personality type reports so you know how to approach that person, how they're motivated, what they're probably thinking, what to focus on, what to stay away from. I remember, I forget the name of it. I'll have to find it, but I love everything like that. I love it.

**Jean:** Final question. What is your best piece of advice for managing partners?

**Sarah:** The flip side of my advice for the marketers. Pull your marketing people into the conversation. If managing partners are not already including your marketing or practice growth and BD people into your very highest-level strategy and conversations, you're not taking advantage of all of that opportunity. Tie them very closely. Communicate with them. Tell them what you're trying to accomplish. Give them a chance to be a part of it. Task them with being a part of it, make that the crux of what they're doing for you. Then, trust the advice they give you because it's oftentimes going to look different than what you might think, and it might be expensive at times. Trust the advice and welcome that new part into the strategy. I've only ever seen it be successful.

**Jean:** Wonderful. We've been talking today with Sarah Cirelli, the Chief Marketing Officer at Grassi Advisors & Accountants, and the 2021 Marketer of the Year. Sarah, congratulations, again, and thank you for your time today.

**Sarah:** Thank you so much.

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