

A Capstone Conversation With Katie Lyles



Events and Marketing Coordinator
Lane Gorman Trubitt



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), president of [Capstone Marketing](#). I am happy to be talking today with [Katie Lyles](#), events and marketing coordinator with [Lane Gorman Trubitt](#) in Dallas, Texas, who was recently named the [Association for Accounting Marketing 2021 Rookie of the Year](#).

Katie joined Lane Gorman Trubitt at the end of 2019, following her graduation from Texas A&M University of Commerce, to manage the firm's live events in 2020. All of us know what happened next. It was COVID. Within two weeks of quarantine, Katie designed and established a plan for digital events through the rest of the year, which saved the firm more than \$90,000 and generated more revenue than any previous events season. Plus, working with the firm's PPP Task Force, Katie created a series of webinars and all of the social media marketing, email marketing, paid advertising, and personal email templates for these webinars. Her efforts contributed more than 55% of the PPP Task Force revenue. Katie, congratulations on being named the 2021 Rookie of the Year, very well deserved.

Katie: Well, thank you. And, thank you for having me today. When I hear that summary of 2020, it's crazy that that crazy year can be wrapped up in a single paragraph.

Jean: Well, we can make it a long paragraph ...

Katie: I know, there's a lot more in there that's not, so I think I was really excited for this award, I was very shocked. It's a very big blessing.

Jean: Now, didn't you have folks there in your office that celebrated with you?

Katie: Yes. We just remodeled our office and were starting to come back to the office, socially distanced, of course. My boss said we were going to watch the awards in a conference room. Little did I know, everyone who was in the office that day was standing behind me in the glass wall, and they had flowers for me. It was really sweet.

Jean: These are some of the bright spots within a tough time, right? I'm glad your folks really made it special for you, because it is a big deal. We've already mentioned this pandemic, and I probably have started this answer already, changing your live to webinar, but what would you say is the biggest change that you made during COVID?

Katie: I think the easy answer is, obviously, the events. We anticipated to have about 20, 25 events in 2020. So, in April, after everything had shut down, we evaluated where do we go from here? We transferred all of those live events into a digital platform. What we didn't know was 2020 was going to bring a new interest to marketing when it comes to our accountants. They finally had the time to really evaluate what marketing looks like for

them, and they found that it improved their business development. When we had their participation and eagerness, we were able to speed up that process. A lot of the webinars that we had scheduled, they were planned and executed within five days, which really, really improved our numbers, and we were able to have over 38 events last year.

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Jean: Wow. There's nothing like a crisis to get their attention, right?

Katie: I know. The harder truth to that is we're dealing with the aftermath of 2020 now. It was great to have their participation and their interest in marketing, but as things are starting to speed back up with day-to-day life, business development, billable hours with clients, we're seeing that participation decrease. So, it's all about how do we continue their eagerness and participation and help them learn that being involved in marketing will improve your business development and the firm's overall business goals.

Jean: Right, and it's not an either or. They have to figure out from a time management standpoint and their skills the best activities for them to be involved in.

Katie: We've had a lot of partners keep that same mentality, but it is hard to keep the momentum going whenever you have so much work from 2020 that was moved to the next year.

Jean: You bring up a very interesting point there. I'm going to have to think more on that. When everybody is rallying and trying to pull everything together, it is exciting and motivating. Then again, you take a breath and realize all of the other responsibilities you have.

Katie: Exactly.

Jean: Tell me, from the changes that you've made, what do you think is going to stick after COVID?

Katie: I think we have learned digital events are pretty much here to stay. It's all about making them more interactive and more enjoyable for the audiences. We saved a lot of money from in-person to digital events in 2020. I think we'll see a decrease in our in-person events going forward, but it's all about meshing the two together.

Jean: Right, not foregoing live events altogether, because it is important for us as human beings to be in front of each other, but there could be a better mix now between the live and the digital.

Katie: Yes, exactly. Our CPAs really enjoy the networking aspect of live events. So, obviously, with digital events, that's a little harder.

Jean: What platform have you been using?

Katie: We majorly use Zoom webinars. That's what we started with in 2020, and we're continuing that. However, we are hosting a virtual conference in August on Whova. It's a virtual platform that has all of the things that you've seen in your basic digital conferences. We're really excited with that, and it integrates into Zoom webinars so there's a mix there.

Jean: Nice. Spell that for me, that name.

Katie: It's Whova, W-H-O-V-A.

Jean: Okay, because I know folks will probably want to explore that, too, and learn a little bit about it.

Katie: It is very cost-effective, especially compared to a live event. I think their basic package runs about \$1,600. That's cheaper than most venues.

Jean: Absolutely. What have you learned about yourself during this pandemic, especially since you were in a spot, Katie, graduating school, starting this job that you think is going to be one thing, and it turned into something else? What have you learned about yourself?

Katie: I'm very organized. I think that plays a key role in my success as an event planner. Keeping all of the venue contracts in line really helped whenever we had to cancel those events, and balancing all of the different aspects of my job. Event marketing is probably 50% of my job and the other 50% is bigger projects that come down the pipeline. So, keeping myself organized allowed me to keep a level head in 2020. Without that aspect, I really don't know what I would have done.

Jean: I think as marketers, too, we do need to be organized. I'm sure there are different levels if you were to take a big group, but I think the partners rely on the marketers to keep track of all those details so they don't have to.

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Katie: Yes. I'm the admin for all of our sponsorships. With that comes a whole other level of craziness. I also like to think that I'm very self-aware. I'm able to evaluate after a big project, what was the success and what I could have done better. A lot of people don't have that ability and it holds them back, but I like to think that it helps me move forward.

Jean: Right, because, you know what? What's the saying? If we're not making mistakes, we're not doing anything different.

Katie: Exactly. I think this industry is full of places to make mistakes, but with those mistakes you learn what could potentially work.

Jean: I know what you mean. For years and years, I used Adobe Connect. When the pandemic hit us, I realized that that platform really needs work. So, I had to learn a lot about Zoom really fast. I had my own “drinking through the firehose” experience using the technology because everything went from live to looking at each other like this.

I know you've only been with your firm a couple of years, but what have you found so far to be the biggest challenge in marketing CPA firms?

Katie: I think I can speak from the new aspect of coming into the industry, especially as someone who's trying to learn more about their company and the industry, there's not a whole lot of resources out there for accounting marketing. Now, you do have the Association of Accounting Marketing, but that's really the only place that I've been able to find useful information when it comes to advice. A lot of articles out there for business-to-business marketing, they focus on a specific aspect that normally doesn't work for accounting marketing. So, it's all about trying it out for yourself, which can be really challenging for someone that's new to the industry, and very intimidating.

Jean: That's an interesting statement, as well, because we do get a lot through AAM. It clearly is the number one resource, but I guess there's times, too, that we can learn things from other industries and how we might adapt that to accounting.

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Katie: I think it's all about making accounting marketing more creative and more insightful. That'll drive more people to come into the industry or to write about the industry. That's really what we need. We need more resources out there and more research because accounting marketing isn't the most luxurious marketing. We know that.

Jean: It's not.

Katie: No, but it's all about trying to make it better for the consumer. I think the industry as a whole needs to band together and get more information out there on topics like these.

Jean: Interesting. You're really making me think today, Katie. Thank you.

You mentioned earlier about your organizational skills. Is there another skill that you have that you feel has been helpful to you in your career?

Katie: My ability to talk. I can talk to anyone. I think that really helps me communicate better within my firm and outside my firm, as well. I talk to probably 50 or more speakers a year, so my ability to communicate definitely helps me with that.

Jean: That's wonderful. Communication is a key point of what we do, right? If the marketers can't communicate, the firms are really in trouble.

Katie: My fiancé is an accountant and he likes to say that all marketing people just like to talk and talk and talk and I'm like, "Well, you're marrying one."

Jean: That's right, and they like to sit at their desk and tick and tie, use that adding machine, and do all those analytical things.

Katie: More creative.

Jean: That's right. Again, you've only been in the profession a couple of years. We're thrilled to have you as part of us. 2020, it was a hard year to enter a new industry. With all that being said, I'm sure you still have met other marketers within accounting firms. What would be your best piece of advice for them?

Katie: To not be afraid to try something new. I think pre-pandemic, we were taking risk, but we weren't taking enough risk. In order to stand out in the accounting world I think you really need to try new things, and not be afraid to let those things fail. That's really my, not advice, but that's my thought.

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Jean: A smart one because like we said before, to try new things we're going to make mistakes. Things aren't going to be perfect, but we do need to be willing to do it. Then, let me turn the view. What would be your advice or thoughts for other managing partners?

Katie: That's a tough one. As someone who has been in the industry not super long, I find it hard to give people advice. I will say that I think it's a great idea to really get to know the marketing side of your business. A lot of managing partners are CPAs, do have the accounting background. It's also important to remember that marketing and the success of your business comes hand-in-hand. There's one aspect of your business you may not know about. Take the time to get to know the industry better, get to know your marketing team better, whether that's having training with the leader of your marketing team, or doing CPE marketing-related materials. It's really important that you know the success of your marketing directly contributes to the success of your business development and new business goals.

Jean: Doesn't that speak to the need for marketers to be sharing the results of marketing initiatives and campaigns so that there is education going on back and forth?

Katie: Exactly. That's what we saw in 2020. We were able to be very transparent within our partner group with what was working, and what we saw was not working. They were able to take that information, digest it, and come up with new ideas for us, and help further our efforts to the projects that were succeeding, so that they didn't continue on this path that we weren't going to go on. It is very important for the leader of your marketing department to be very transparent with the partner group because that's how we can mesh the two together. Marketing cannot do it alone and accountants can't do it alone.

Jean: That's been an issue all along, Katie. What you just talked about, showing them evidence and being transparent, it also takes the mystery out of what the marketers are doing. I still think there are plenty of partners who see very busy marketing professionals in their firms, but they still may wonder what exactly is it that they're doing.

Katie: That's the last thing that we want. We want our managing partner and the partner group as a whole to know what we're doing on a day-to-day basis, so that, one, we don't get overloaded with work, and two, they can see that we're actually worth their money, which leads to potential budget increases in the future.

Jean: Yes, I agree completely. Let's face it, accountants are really smart people and they know the value of the dollar. Being given the evidence of what's working and what's not, like you just said, gives the power to increase that budget when they can see where it's going and the investment they're making. That's a great point.

We've been talking today with Katie Lyles, events and marketing coordinator for Lane Gorman Trubitt, and the 2021 Rookie of the Year. Katie, congratulations, again. I appreciate your time today.

Katie: Thank you so much. Bye.

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