

A Capstone Conversation With Kristen Lewis



Director of Marketing
EisnerAmper



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), president of [Capstone Marketing](#). I am thrilled to be talking today with [Kristen Lewis](#), director of marketing with [EisnerAmper](#) and the most recent inductee into the [Association for Accounting Marketing Hall of Fame](#).

Inductees need to have a minimum of 10 years of experience in the profession, service to the profession as well as to the Association for Accounting Marketing. Kristen certainly fills this description. She started her accounting marketing career in 1999 – remember that, Kristen? – as a marketing coordinator at Goldenberg Rosenthal in Philadelphia. So, here is a woman with more than 20 years of experience in this industry. At EisnerAmper, Kristen is responsible for the firm's marketing initiatives in Philadelphia and New York – two big markets – as well as some firmwide strategic initiatives.

In her service to AAM, Kristen was named the AAM Volunteer of the Year in 2009. She served on the board from 2010 to 2018, serving as president from 2016-17. She has also chaired and served on several committees, including the Communications Committee, the Content Assessment Task Force, and most recently, the Diversity, Equity, and Inclusion Initiative. Kristen, congratulations on being inducted into the AAM Hall of Fame.

Kristen: Thank you so much. Thank you for having me.

Jean: I understand there was a celebratory dinner afterwards. Kristen was there live at the Summit when she received this award. Were you surprised?

Kristen: I was 100% surprised. My loved ones from my day job, from my AAM job, from my life, apparently, they were all conspiring against me, to lie to get me to the ceremony because I was originally just going to be a virtual attendee for the policies that we have right now around conferences. Thinking back, it's like when you see one of those movies and the big twist is revealed and you're like, "Oh, that's how that happened." They got me there. They lied, and I'm oblivious, and I just went for it. It was a shock, a good shock. To be mentioned with some of those folks, people who have taught me and mentored me and meant so much to me, it's still amazing that I'm on that list.

Jean: It's very well deserved. [Lauren](#) could barely get the words out because she was so emotional. It was all just perfect.

We've been talking a lot about COVID and a lot about this pandemic, right? We're going on 15 months now. Tell us about one of the ways that you've had to transition. I hate using this cliché word pivot. Tell me how you've changed up an aspect of the firm's marketing program due to the pandemic.

Kristen: I think the biggest thing is the online pivot for all of our programming. We've always done some webinars, but we were a very heavy in-person events shop, a lot of networking, a lot of folks in a conference room, and hands-on relationship building. I think we had done one program on our brand new ON24 platform when the evacuation order came down like, "Get out of the offices." I'm like "Okay." We had done a small webinar at that point on ON24. I'm just shocked at how quickly we were able to change things up. We became an online machine. Everything we were doing we were able to make national in scope because the borders fell away. You're not worried about ordering bagels for people in different places. It became an opportunity for more people to get engaged. We figured out how to do some virtual networking, which was probably the biggest thing that had to be taken out of our usual play in terms of market approach.

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Nothing was the same. Of course, we were trying new things, but we found different kinds of wins. If I could say anything about that whole march of the virtual programming, more online, resulted in an elevation of the work we had been doing as content marketers, and an increased appreciation of the role that leadership plays in building relationships and establishing our brand and all the rest. There was no other game in town. It was helpful to spotlight all of the hard work that goes into those things. It wasn't just, "Oh, it's nice that we have all these articles." It was, "Oh, wait a minute, this is an engine for growth. We're getting leads. We're following up on them. We're scheduling virtual meetings, etc." It really helped establish that we weren't just the people who bring you into a room and wine you and dine you. We were helping you with legitimate solutions for your business and thought leadership and all the rest of it even in a virtual environment. It was a big change.

Jean: If there was ever a moment to lift the credibility of accounting marketers, this past year was absolutely it for such an opportunity.

Kristen: Yeah, for sure.

Jean: And the online networking, kudos. I've worked with some clients on that because I don't believe a lot of that is going on. I think there's lots of CPAs out there who are thinking, "We got out of this requirement to network. I don't like doing that anyway." The firms that are doing it are definitely going to reap the rewards.

Kristen: One of the ways that we've approached it, too, is to change it up. We started, "Let's have some virtual networking rooms before or after a webinar to talk about, 'What are you seeing in your businesses, best practices,' doing smaller roundtables. Then, "Okay, how do we have fun now, now that we've done that?" People are a little bit bored being on a Zoom call. What do we do? A cooking class? Do we have people talk about wines or art or a number of different topics? That's the way you can build those relationships and have a little bit of fun, even when you can't be together.

Jean: What has been the reaction to such activities?

Kristen: Mostly positive. We found differing levels of engagement. It can be hard to learn how to do these things virtually, when you're one of those folks who jumps in a room, shaking hands and making things happen. You're not shaking hands, you're not necessarily making things happen in the same way, but you are building those sorts of relationships that become something additional. So, for the most part, it has been positive. I think people are weighing, "What's the balance?" We will continue to do some of those things going forward for certain, but we're also raring to go to get back in rooms with people because we love that.

Jean: Actually, being face to face with people, right? Even without a mask?

Kristen: I know.

Jean: I'm looking forward to that, too, for sure. Through this crisis and your firm's response to the crisis and how you've done things a bit differently, what have you learned about your firm or your colleagues or yourself? Did something rise to the top?

Kristen: I've been really proud of the resiliency I've seen in our team, our marketing team, and the broader firm. We really stuck together and figured things out on the fly. We like to use the term, we build the car while we're driving it. This proved to us we can do hard things, we can do new things, and we can also push ourselves and others, our colleagues to do things that are kind of scary. It's a lesson I learned for myself, too. There were times when we launched something new, like our first attempts at virtual networking or a big national summit, you have to face down a lot of your fear and anxiety after you sold them on the idea. Like, "I talked people into this thing, oh God, I hope it works. Is it going to fail?"

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Mostly though these things worked out, and it doesn't mean that they were all perfect. We learned lessons along the way, but they weren't massive failures. We were pretty much rewarded for most of the new things that we tried. It was a great lesson for the individuals on our team. It was a great lesson for me to just go for it. Also, for our firm, "Okay, let's trust them with this stuff. We're not sure at first, but you know what, we're making it happen and we're seeing some value from it."

Jean: Even as marketers, we can sometimes get stuck in our little space in how we do things and what we do. It's good to get tossed out there, so to speak, to try something new and different that gets you a little nervous, but that's also the desire to grow, right? We need to continually learn new skills, as well.

Kristen: Then, if anything, it has not been a wonderful time. The connectivity, the productivity. We always want to be productive in what we do, but the way even the broader firm, the practitioners, the ability to get a new...we had to set new standards for everything we were doing, changing the model. This is against a backdrop of loss and fear

and sickness and uncertainty in the world. People call me sentimental sometimes when I'm on meetings because I always take time out to thank the team. I've always done that, but I get a little bit sappy these days because I'm like, "15 months, guys, we've been moving mountains." We should always be grateful for what's going on. Seeing it in action can be pretty inspirational.

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Jean: I've given a lot of thought about how I'm spending my time and how I want to spend my time and things that, value and you're thankful for in your life. There are lessons here we need to learn. I don't think we've learned all of them yet, but they're there if we're looking hard enough for it. I am a believer.

Let's step away from the pandemic for a minute. You began your career in 1999, over 20 years, Kristen. What do you think is the greatest challenge in marketing an accounting firm?

Kristen: My answer to this question is probably going to be different whatever day you ask me. I've been around to see the challenges. I feel like one of the biggest challenges that we have to face as marketers for accounting firms is getting down to true differentiation. It can be a really tough concept, identifying how you are uniquely different from another firm. How do you communicate that in a genuine way that's going to resonate with the market, sometimes that feeling butts up against the nature of a CPA firm. It makes it harder because CPA firms are conservative, they're compliance driven environments. They generally want to see what other people are doing before they take a leap sometimes, and that makes the bold ideas that maybe will help differentiate you. They're a harder sell, but I think we've all been making, especially in this environment, strides there. Building up that trust helps you have those genuine conversations as a marketer and as a team member, as you're putting together your strategic plan, to figure out how do we say something that's different from everybody else? How does that translate into something that's going to benefit that client? What's their real-world experience that we can impact?

Jean: Over the years, you're not the first one to mention this challenge. It's real.

Kristen: It's the old story, you send a partner to the meeting with the proposal, and they're like, "Oh, they told me that they want good service. They want..." I'm like, "Did you listen or did you ask questions?" It's not against them. It is very difficult to get down and ask those questions and you have to go spelunking to get to what the difference is.

Jean: Exactly. It is a challenge, but the smart firms continue to work at it.

Kristen: Yeah, for sure.

Jean: For me, that's the bottom line. Let's face it, there are folks out there who don't think any of that is important. They want the work and what we do, but a prospect also wants to know, "What's my experience going to be like working with this firm? Why would I select them over another firm?" It's all extremely important.

If you look over, let's say the past 10 years, what do you think has been the biggest change in accounting marketing?

Kristen: The rise of content marketing in terms of its importance, and that's 100% tied into the change in technology. Marketing automation, the web tools we can use now, the rise of serious social media strategy. Ten years ago, is like, "Should we get this account? What are we doing? Do we want to tweet? What's tweet?" The partners would make bird jokes and you laugh along with them.

Jean: Kristen, I remember the days when at a Summit one of the members said, "People are going to be able to search the web and find you." We were like, "What?" It's monumental changes.

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Kristen: The rapid advancements, you can't keep on top of this stuff. It's a whole new ballgame. The really good thing about this is not that there are new platforms to reach people and reach people in a dynamic way. You can get segmented with the technology that's going on, but it's also given us more metrics that we can plan better, adjust our strategy in the middle, prove our concepts. There's still the fuzzy element of the anecdote in terms of direct causation. I've got a drip campaign going to this guy for a year, and he has lunch with one BD. Finally, we're great. Is it the lunch? Is it that he got the lunch because my campaign program worked well? It's all interconnected a bit. This gives us a little bit more science around how we are interacting with the audience at large clients, prospects, the greater business community, and it's really helping us have a stronger foundation and grounding in the data. That interaction intelligence that helps us make important decisions about where we invest our time and our efforts because we all know that both of those things are very limited.

Jean: Don't you think having that data gains more traction with the partners and managers in the firm when they can see numbers? "Use the spreadsheet."

Kristen: Sometimes that ends up with someone trying to dissect your numbers, which is also fun. It gives you additional credibility, too. I had a meeting with this partner last week who I don't work with that much who quoted back a statistic I said in some meeting, like three weeks ago, and I'm like, "Oh, my God, you were paying attention." He said, "Well, yeah, you used a number." I'm like, "Yeah, okay, good." Well, then I'm making my points because I'm relating it to something that's a little bit more tangible and success-driven. You can see a result.

Jean: Which factor or which one of your skills has contributed to making you a successful marketer?

Kristen: Oh, boy, this is where I get nervous talking about myself. "I'm, great. No." One of the biggest things for me is I see connections, and connections in terms of how do I put people and resources together. Whether it's to solve a problem or make a situation better. All of that stems from communication. Not just writing or speaking. True communication is grounded in listening and being able to effectively sit back, read a room, ask questions. As marketers, it's really important for us to develop a rapport with our internal clients, the partners, the managers, and everyone else asking those questions about, "What are you seeing? How are you experiencing things? What are the clients telling you?" Trying to figure out what are they willing to do. How are they willing to participate in that process, what their drivers are?

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Some people are really focused on compensation, other people want to be recognized for the work they're doing. Then, we have to translate those sorts of concepts into the real world. Whether it's positioning my business plan for an initiative so that my partners will say, "Yeah, this seems good. Okay." Or if it's figuring out, "What are they saying on the technical side? Then, how is a person in the real world who is not a CPA, but who may buy their services, how are they going to take that and find value in it?" Being a listener, and then a translator, to figure out how to get those messages out. That's helped me immensely.

Jean: That was a great answer. It emphasized the importance of being able to get back together in person because when you talk about reading a room and all of that, you're seeing people online, but it's not the same. You're not seeing as much of the body language and all of that to be able to interpret what they're thinking.

Kristen: You can tell, too, when you're virtual, one of the other struggles we have is that people have four screens. There may be something very exciting or terrible or something going on on a different screen but, focus on, "Let's solve the problem at hand and let's have a genuine dialogue back and forth," instead of ticking a mark, "We got the meeting done." Let's have a genuine exchange.

Jean: What would be your best piece of advice for other accounting marketers?

Kristen: My best piece of advice is well beyond just knowing your stuff because I think lifelong learning and curiosities is hugely important. It's not just about what's going on in your firm, but you need to know that stuff. It's like the outside world, but I think that the marketers' game is really about expectations. It's about setting them, managing them, and then exceeding them and doing your best to exceed them. When you're setting those expectations with leadership and with everybody on the team at all levels, what are those priorities and focus areas? How is that going to roll up to your firm's strategy? This is where you can say, "Hey, guys, this doesn't make any sense. Why are we pursuing this? Our firm is not trying to grow that area, why are we doing this thing?" A lot of energy gets wasted,

randomly going out and doing things at an accounting firm. I can say that because it has been 20 years. We've made great progress. I remember at the beginning of my career would be like, "Just do this program for this guy. Get him happy."

Jean: Be an order taker, right?

Kristen: Yeah.

Jean: Don't think strategically, just do things.

Kristen: Do what will make him feel happy. Cool? I don't know, is that good for the firm? So, identifying that and figuring out what the plan should be around that and what your results are going to be and what those success factors are for everyone involved. You can't have a plan and then have it be on the marketers to implement every element of it. Everybody has got to have skin in the game and a role and something to do if they're going to claim the success or just be a part of it.

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So, there's setting expectations. There's managing those expectations, which is hugely important. That's where your rapport can break down, if you're not a good communicator, are you reporting about progress? Are you having regular communication in the right language? How you speak to a member of your team is going to be different, depending on their level, or what they're doing with the project, etc. Then, there's accountability measures we're talking about, you don't want to be left holding the bag as a marketer when something doesn't go well because maybe the team didn't have buy-in, or they just rubber stamped it and said, "That seems like a nice campaign, go off and do that." You don't want that to be happening, either.

Finally, for marketers, is exceeding expectations. We talked about that a lot, how can I go out there and kick butt and look great. We really have to go the extra mile in what we do. Marketers, I love our energy, and we've got great ideas. When we go the extra mile, we can be very, very extra about it, which is good and it's fun. If you approach these things like the CPAs do, if you act like an owner, you are owning it. If it has to do with marketing, you should be owning it, what's going on with it. You're going to be successful, they're going to see your passion, and that makes people want to work with you that much more.

Jean: What would be your piece of advice for managing partners?

Kristen: Depending on the day for that one, as well. I think it's the importance of bringing your marketer in, bring them to the table, bring them in early and often. Do you have these sorts of conversations, they can really help build and implement your strategic plan? Beyond the pure marketing and sales aspects of those, how are you addressing issues that are in the Zeitgeist? All of this has to do with your firm's brand. What's the experience you're putting out there into the universe.

Marketers also help you explore new approaches to problems you may have. You may not think that we have a certain expertise. We may not, but we may ask a question that'll give you a great idea. Sometimes we're brought in a little late when a major decision has already been made, and we're trying to implement a plan that we didn't help build. That's not just frustrating for the marketer, but ultimately less successful for the firm. I want to caution that marketing is not the answer to every problem. But you know...

Jean: Most of them.

“You may not think that we have a certain expertise. We may not, but we may ask a question that'll give you a great idea.”

Kristen: It's tied into so much and the value in perspective. We talk a lot about how do we bring in multi-disciplinary teams to do a really great job on an engagement. It's kind of the same approach you want to do as you build your firm. Bring in those different perspectives and they're going to help you build a solid plan that gets stuff done.

Jean: Now we know why Kristen was inducted into the AAM Hall of Fame! This was so fun, Kristen. Thank you. I've been talking with Kristen Lewis, director of marketing at EisnerAmper and the most recent inductee into the AAM Hall of Fame. Very well deserved, Kristen, congratulations again. And thank you for your time today.

Kristen: Thank you so much, Jean. I appreciate it.

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Jean Caragher
Capstone Marketing

icaragher@capstonemarketing.com
<http://www.capstonemarketing.com>
<http://capstonemarketing.com/category/blog/>

Connect with **Jean**:

<https://www.linkedin.com/in/jeancaragher>

[@JeanCaragher](#)

<https://www.facebook.com/capstonemarketing/>

35246 US HGY 19 N
#225
Palm Harbor, FL 34684
727.210.7306