

# A Capstone Conversation With Brenda Sleeper



BRN Relationship Director  
BDO Alliance



CAPSTONE MARKETING

## Capstone Conversation with Brenda Sleeper BRN Relationship Director



Hello, everyone, this is [Jean Caragher](#), president of [Capstone Marketing](#). I am thrilled today to be talking to my friend and colleague, [Brenda Sleeper](#), who was recently inducted into the [Association for Accounting Marketing](#) Hall of Fame, thus becoming a Bruce W. Marcus Lifetime Fellowship Member of the organization. Brenda is a BRN Relationship Director for the [BDO Alliance](#), where she manages the relationships with various BRN firms nationwide.

Brenda has helped make things happen at AAM since joining the organization in 2001. She was AAM's Volunteer of the Year in 2010 and served on the AAM Board of Directors from 2012 to 2016. She has served on the Business Development and Member Growth committees and continues to be the AAM Ambassador. Brenda, congratulations on being inducted into the AAM Hall of Fame. Very well deserved.

**Brenda:** Thank you. I was truly shocked. I don't know if you know how they did it, Jean, but because our conference was the same night at the same time period, they set me up to do a video for the AAM Ambassador for volunteers. I got all dressed, I put makeup on, and they're recording me. Then, [Kristen Lewis](#) came on and said, "Congratulations," and I'm like, "What?" I have to tell you, I was totally taken off guard. They really got me. I just want you to know, Jean, when I joined AAM, my first conference would have been 2001, and it was Toronto, I believe. You were one of the first people that I met. You somewhat mentored me, and you probably don't even remember that because it was a long time ago, so thank you.

**Jean:** Thank you for saying that. So, this is coming full circle because 2001 was the year they started the AAM Hall of Fame. That's when [Adrian Ornik](#) and I were inducted. That's a great, circle of life moment right there. Wow, thank you for that.

**Brenda:** I reached out to you asking questions. I think it was then I knew that AAM was special.

**Jean:** It is. We both know now that it is very special, for sure.

Well, the video you did with Kristen entertained us greatly as we were in the ballroom at the cocktail party. Your reaction was, "Oh, I got picked when I'm not there," or something like that.

**Brenda:** Yeah, of course I'm not there.

**Jean:** We just laughed and said, "Well, we'll give you extra applause and congratulations next year when you can be in person with us." Hopefully, there won't be that conflict again with the conferences.

Brenda, I know you're with the BDO Alliance. You're not within a firm now, but you have been. Brenda has had many different roles in the course of her accounting marketing career. I know you're in contact with lots of firms, and you know lots of people and have a big network, so you know the pulse of what's going on. With this Covid crisis, we're just over two years now in dealing with this pandemic, right? Tell us what you have learned about yourself or learned about your colleagues that can help you in the future.

**Brenda:** Well, it's really interesting. I was in a little bit of a unique position in that I've worked remotely or virtually since 2005. So, when Covid came along it wasn't like my world from a work perspective was turned upside down like it had been for probably most people. Sometimes when you work remotely, having done it for so many years, and Jean, you do it now, it's that sometimes you feel a little isolated, right?

**Jean:** Since 1998, I've had Capstone Marketing. I've been working out of a home office, so I know exactly what you're talking about.

**Brenda:** I think I kicked into gear in terms of when Covid hit. It was like, "Okay, we've got this." Who are you going to be able to hang out with? We were in Boston. We moved down to the Cape because it's a little bit more open air and not so crowded. It's really interesting because all of our team has been working remotely, so we didn't really skip any beat.

**“... people who know me might make fun of me that I am the queen of steps.  
20,000 steps every day.”**

I would say that some of the colleagues and friends, I did feel bad for people that were maybe living alone and isolated completely because I think that was really tough. I know some people that quit their jobs, or moved home, or whatever, so that they would have some sort of surrounding. But it's really funny, so when Covid struck, and I was like, "Okay, we've got this." So, people who know me might make fun of me that I am the queen of steps. 20,000 steps every day. Late at night I was saying to my husband, "Okay, come on. Let's go." It was like this resilience kicked in. And, of course, you also want to keep your sanity, right?

**Jean:** Oh, for sure.

**Brenda:** Every night down here at the Cape there's this 300 Committee and every night I'd pick a different trail. I can't even tell you how many different trails we walked. I think when it comes to what I learned about myself and colleagues, is just how everybody came together to help each other. I'm hoping that when you say, "How can it help you in the future," I'm hoping we hang onto that, that with time it doesn't disappear. So, we slip back into our old habits, and that we're still there for each other. And that we, from day to day, like you said, like being at the conference this year, everybody was joyous, right?

**Jean:** Oh, they were.

**Brenda:** Let's hope we can keep that joyousness if that's a word.

**Jean:** We'll make it a word.

**Brenda:** We'll make it a word. I think that just people's ability to help each other was pretty amazing.

**Jean:** I would agree completely. I think we all are a bit more patient with each other these days, and kinder. With all of these virtual meetings, back in the day when we were doing this and a dog barked or there was some sort of disturbance, people would be so offended. Now it's, "Oh, what kind of dog do you have? What's her name?"

I think people are genuinely interested in learning more about other people outside of what you do together business wise. I think that is absolutely refreshing, and I agree, I hope it sticks. We need a kinder world these days, so if that's something we can do to help with that, I'm in.

**Brenda:** Me too, agreed.

**Jean:** Again, your experience with all these firms and in the profession, 20-plus years at this point, Brenda, what is the greatest challenge in marketing a CPA firm?

**Brenda:** It's interesting. If you think about why they hire marketers or business developers, the game has changed today. We have some firms that have employees in other states, they have employees remotely in other countries. One of our firms, they have employees that moved to London. Their family moved to London for a couple of years, something that was on their bucket list, and something now that they could do. We have a firm in Maine that's a pretty good-sized firm and they have employees in 40 states, and they do work in 50 states. So, I think the game has changed. From a marketing perspective, the game has definitely changed.

**“One of the things I've noticed on a challenging side is that some of the marketers are finding that firms, because they have such issues with capacity, they're not really looking to grow.”**

One of the things I've noticed on a challenging side is that some of the marketers are finding that firms, because they have such issues with capacity, they're not really looking to grow. They bring prospects to them, and the partners are like, "I don't have time for this. I can't do it." So, I think that from a marketing perspective, that's a big challenge for some of the firms, that that's what the marketing role is, or it's a big part of the marketing role. So as a marketer sometimes you have to switch gears, too, so maybe you focus on retention. Maybe you focus on expansion of services or get more involved in client service.

So, I would say that that's probably the biggest challenge, marketing in an economy or a market where, it doesn't matter if you're manufacturing, or retail, or what, everybody is...CPAs had the challenge of capacity before staffing, right, and capacity, but it's now that much worse. It's everywhere, it's not just in the CPA market.

**Jean:** This is also an opportunity for marketers to play a more strategic role in helping their partners to right size their client base. I do this workshop, I gave it a good name, but it basically is about how to fire clients. Marketers could absolutely play a role in that, too, because I believe that partners would be more willing to pursue those prospects the marketers are bringing to the table, particularly for ideal prospects, if they were ridding themselves of the clients that they shouldn't be working with anymore.

**Brenda:** Good point, Jean. You know, into last year and this year, is the first time that many firms, Zoom calls, some of the in-person meetings we've had now, they're all talking about getting rid of those C-level clients. We've been talking about this since 2000, right, or maybe even before that. You were talking about, "Let's get rid of those clients that aren't profitable that really just perhaps you can move up market with your pricing and such." It's really interesting to see, I mean, I hate to say that it took Covid or a pandemic to change the industry, but it really did.

**"Let's get rid of those clients that aren't profitable that really just perhaps you can move up market with your pricing ..."**

I remember when firms would say, "How can you work remotely?" I'm like, "Your employees could work remotely. You have issues with capacity. Maybe people need to work from home a couple of days a week. Inevitably, it was the same answer over and over again, "That would never work in our industry."

**Jean:** Right, they have to be there.

**Brenda:** Now look what happened.

**Jean:** That is true for the new hires. They do need more hand holding, and live guidance, and all of that, but for those partners, and I know lots of firms out there, they're trying to get their people back in the office in some sort of schedule or timing. It's never going to come back five days a week. There are people who want to be in the office five days a week, but there are plenty that don't want to be in the office five days a week.

So, you talk about that challenge of they're not pursuing prospects that marketers are bringing because they're working with clients they shouldn't be working with anymore. Well, if you're working with clients that you shouldn't be working with anymore and your staff doesn't want to be working on them anymore either, and anybody, any CPA could quit their job today and have another job tomorrow. I don't know what it's going to take for them to really sit down and make those hard decisions. It's absolutely a challenge.

**Brenda:** Well, I do think they're doing it. Based on the conversations that I've sat in on, more and more firms are doing it. I mean, they've even asked for letters, and I've heard conversations like, "Well, what happens when you fire a bunch of clients? Are you worried about what they're going to say on social media?" I mean, I've been through all these conversations with firms and it's really interesting to hear them share back and forth how they're handling it. It's hard because some of these clients may have been clients. They tried

raising their rates, thinking, "Well, let's just give them a really big bump," right, and they stuck around.

So, then they raised their rates again. Guess what? They stuck around. In some cases, some of these returns could be done by an H&R Block. That's not my words, that's what some of the firms have told me, and I'm like, "Well, then maybe you can transition them. Help them so that you can move up market." So, I think the pandemic made them see that, and especially capacity issues, the fact that if they don't want to work with them, the staff doesn't work with them either.

**Jean:** Exactly. Every staff person has a client they want to fire.

What factors or skills do you see help make marketers successful?

**“...sometimes you have to outsource, and I think sometimes marketers are afraid of that.”**

**Brenda:** It's an interesting question because, if you think about it, when they hire marketers, they typically hire you, and there's a lot of different skill sets you could have, whether it's marketing research, strategy, website, PR, branding. I think that you don't need to be all things, and I think it's hard for somebody to be...sometimes you have to outsource, and I think sometimes marketers are afraid of that. You don't have to have all the skill set, but instead of just looking at it from a marketing perspective and that you've been hired to do marketing, look at it from a business owner perspective. How might you do things in your role differently if you were an owner of the firm, right? Put yourself in their shoes. Would you be doing this campaign? Would you be doing that social media?

Whatever you're doing, think backwards. What are your goals for the firm, and then how can you participate on a broader level than just keeping in your lane and just doing marketing? It's wearing that business hat, and to really be strategic in your approach.

**Jean:** I think you would agree that there are still a lot of generalists out there for those one-marketing-professional firms where the marketer is really doing a lot. Although, I do see some outsourcing. I'm sure you do as well, particularly in the digital area, or SEO, or things like that. Can you speak a minute, because I also see as marketing departments in firms grow, particularly with the largest firms, how specialists are being hired to be part of that overall marketing team? A firm may hire someone that specializes in digital, or they may hire a writer to handle all of that. Are you seeing a lot of that?

**Brenda:** There's definitely more of that. It's really interesting if you think about it because how I ended up in the industry was a firm that didn't have a marketing director, and they had outsourced a PR company. I'm not even sure what the strategy was for that at the time. It was to help them get better known in the community, right? This individual was really struggling with the firm and trying to get them to implement anything. I moved into the neighborhood, and that's how I ended up going to work for this firm.

**Jean:** So, we can thank your husband for that? Is that how it works?

**Brenda:** You can, yeah. Remember, when I came into the industry, I came out of another industry and more of in a business role, so not a professional services company. I knew nothing about the accounting industry, so I have to tell you that it was AAM that rescued me. I know I'm diverting to what your question was, but I think it's important for people to know that because AAM is just such a great resource. I'm not sure that I would have stayed in the industry without AAM, because it really helped me to understand all the great connections I made, like when I met you.

To get back to your question, I think the job has become more complex. You could be a generalist back then, because maybe there was, like, branding might have been one component, and social media wasn't even social media. I mean, Jean, I remember when I started doing email marketing and people were like, "You can't do that. That's a violation, that's privacy. You can't do that." I'm like, "Yes, I can. Yes, this is where it's going." When I worked with BizActions, think about all the firms that did not want to email their clients, and now look at us.

**“I remember when I started doing email marketing and people were like, ‘You can't do that. That's a violation, that's privacy. You can't do that.’”**

**Jean:** Brenda, tell me if I'm wrong about this, but in the BizActions days and the information we could collect based upon what a client or contact read or clicked on, the advice then was, "Reach out to that client, but don't tell them that you know what they read because we don't want them to think we're watching them like Big Brother." Now it's like, "Hey, man, we saw you clicked on this article, and what information do you want about it?"

**Brenda:** How about every time you're looking at something on Facebook and then you go onto Instagram or something, and all of a sudden, you've got all those ads coming up? My kids work in that business, so it's kind of the behind the scenes. But it's a lot more complex, I think.

So, I do think that they are hiring specialists. I know personally from what I've experienced here at the BDO Alliance is that we have a small team of just two people, marketing director, and then we did have...we had a manager and she really specialized in the social media piece, which we really weren't there.

Now we're there, and the followers we have. It does take a specialist, I think, to do that, and it also takes somebody that's interested in it, somebody that likes to do it. I think it makes a difference. So yeah, there's definitely some expansion going on. That's why we're seeing these, on the bigger firms, seeing the departments grow.

**Jean:** Yes, which also can support the fact that marketers can really make a career out of accounting marketing if they choose to do that, there are fewer walls to run into, if you will, which is exciting, too. That is, because back in the day the tenure wasn't all that long, and that's greatly improved as well, so we're doing something right.

**Brenda:** Right, what was it, 18 months?

**Jean:** It started out at nine months. I've told the story a million times and I'll be quick. When I moved from Long Island to a firm in Atlanta, this was 1990, on my desk was an article from PDI about the average tenure of CPA firm marketing directors was nine months. And I thought, "What have I done?" It was waiting for me on my desk, so I lasted 11 months and that's when I went to BDO. Oh, my gosh, it's scary. We've come a long way, right?

**Brenda:** We have come a long way. That's too funny.

**Jean:** Tell us, what is your best piece of advice for accounting marketers?

**Brenda:** I think that a lot of folks who I've mentored over the years would ask, "What would you do first? Or how do you think I should position myself? What should I do?" Sometimes, depending on the size of the firm, you feel like you're on an island. That's why AAM was so important, because I felt like I was one marketing person serving on an island when I first started. Then, I met you, and all these other people. Then, I started collaborating, and you realize that there's really nothing that's started completely from scratch, that there's ideas out there that...so I think that if I were to start, become a marketer in a firm today, I probably would say, "Make sure that you're developing relationships and reaching out to find out what other firms are doing, and communicating that, and educating the partners." The marketing role has come a long way, like you said.

**“I think it's understanding what the goals are for the firm, understanding the business, and being part of the team...”**

I don't want to say it wasn't respected. It wasn't understood. When I think back when I first started, the managing partner empowered me to do what I thought was right for the firm, which was a great place for me because I can operate that way. I think it's understanding what the goals are for the firm, understanding the business, and being part of the team as opposed to just, "Here's our marketing director," you know what I mean? It's being part of the team and understanding the business strategy.

**Jean:** It's so important that marketers know how their firms make money, what they do, and how that all works.

On the flip side, what would be your best piece of advice for managing partners?

**Brenda:** Interesting...to respect the marketing role. Through the years that, with all the partners, and somebody would hire a marketing director and they'd have one maybe variation of what they felt they were there to do, is for them to actually empower them to do what they're there to do, and to understand it, to take some time to understand it. I think in the past sometimes marketing directors are hired for the wrong reasons. They might be hired because they want to grow the business. It's more of a business development role versus a marketing role.

Marketing does play a key role in that, but what I've found in everything that I've ever done in terms of businesses is that when you get marketing and business development together, so it could be marketing in the partners, or marketing in the business development role,



when they work together, you're going to achieve much more than if they'd worked together in silos. So, if marketing works in a silo and the partners work in a silo, then you just don't have the great results you can get if everybody can collaborate and work together. It's empowering the person that you hired to do what you hired to do and making sure that you both are on the same page, that they understand what your goals are. Sometimes I think the industry, they hired people and they didn't really know what they hired them for.

**Jean:** I agree. I think in some cases they would hire a marketing professional because Joe Smith down the street's firm hired a marketer. "Oh, so maybe this is what we should be doing," or "I went to our association meeting and however many firms have marketers so we should hire one, too." Not taking into account what you really need the marketer to do, because you touched upon that. They were mis-hired because they had the wrong skills. If they're looking for somebody to represent the firm out in the community, you need someone with a more outgoing personality, or who is able to network and connect people together. Or, if you really need a content person and someone that's going to do a lot of writing, you need to get that person with superior writing skills. We could give six other examples of how that would work.

**“... the key for managing partners is to be open to new ideas.”**

**Brenda:** I think the key for managing partners is to be open to new ideas.

**Jean:** That's a great way to sum up this conversation right there. We've been talking with Brenda Sleeper, the most recent inductee into the Association for Accounting Marketing Hall of Fame. Brenda, congratulations, again.

**Brenda:** Thank you, Jean.

**Jean:** Well deserved, and I appreciate your time today.

**Brenda:** Thank you, Jean, and thank you for all the years of your mentorship. I do appreciate it.

**Jean:** You are very welcome.

**Brenda:** Thanks. Have a great day.

Listen to the free podcast of this Capstone Conversation at  
<https://capstonemarketing.com/capstone-conversations/>

Or, watch it on [YouTube](#).



**Jean Caragher**  
**Capstone Marketing**

[icaragher@capstonemarketing.com](mailto:icaragher@capstonemarketing.com)

[www.capstonemarketing.com](http://www.capstonemarketing.com)

<http://capstonemarketing.com/category/blog/>

Connect with **Jean**:

[linkedin.com/in/jeancaragher](https://www.linkedin.com/in/jeancaragher)

[@JeanCaragher](#)

[facebook.com/capstonemarketing/](https://www.facebook.com/capstonemarketing/)

35246 US HGY 19 N

#225

Palm Harbor, FL 34684

727.210.7306