

A Capstone Conversation With Allison Schlegelmilch



Director of Marketing
RKL, LLP



CAPSTONE MARKETING

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Hello, everyone. This is [Jean Caragher](#), president of [Capstone Marketing](#). I am thrilled to be talking today with [Allison Schlegelmilch](#), director of marketing at [RKL LLP](#), who was named the [Association for Accounting Marketing 2022 Marketer of the Year](#). Allison joined RKL in November of 2012 and now leads a marketing team of nine. Why was Allison named Marketer of the Year? Well, let me give you an idea.

In 2021, she elevated the RKL brand message with a bold new branding campaign and led her team's efforts to implement and adopt a new marketing automation and CRM solution. I know everyone is going to want to know the name of that. She lent her unique perspective to the firm's strategic plan and oversaw merger communications, brand integration, and marketing onboarding for two mergers in November of 2021 and January of 2022. Congratulations, Allison, on being named Marketer of the Year. Welcome to the Capstone Conversation.

Allison: Thank you so much, Jean. I'm so happy to be here. It is an absolute honor to be recognized by the industry, by my peers. Just hearing off that list of things that we've been able to accomplish in these last two years or so is kind of mind-blowing to me in some respects.

Jean: It is a lot of work. This is another example of how the accounting marketing profession is advancing in itself with all the talent we have within the profession now.

Lately, we can't have a Capstone Conversation without mentioning COVID. I welcome the day that we're really just not talking about it anymore. Through this COVID crisis and how your firm responded to it, can you tell us a little bit about what you learned about yourself or what you learned about your team or your firm that you feel is going to help you going forward?

Allison: I'll give you a little bit of background. We moved really quickly. Within 72 hours of the business shutdowns in PA, we launched a weekly webinar series, and we continued that for 38 weeks straight. Every week, every Friday morning, and we focused on PPP and workforce matters and regulatory issues and the latest stimulus stuff that was coming out. It was a huge heavy lift for the team, but it was something that we really enjoyed doing and we really felt called to do.

We quickly amassed an audience week after week. We had folks coming back and really were gaining traction, not only in our own market, but on a national scale. We are a regional firm primarily based in PA, but we have calls from *The New York Times*, *The Washington Post*, *The Wall Street Journal*. These are folks that are our go-to media list folks. It was really exciting to see how our thought leadership was allowing us to take a little bit

more of a national stage on this issue. And there's just a ton of momentum. I really learned so much about myself during that time.

I think the first and foremost thing that I learned was about myself as a leader, it was myself and it was a few of my colleagues from throughout the firm, some of them being partners, others being senior leaders. We would get together and talk about what our clients were facing. I learned that there's times that... we had no playbook, right? Nobody was telling us what to do.

Jean: Well, let's get our Pandemic Awareness Toolkit, right?

Allison: It was completely unprecedented. We didn't have a playbook. We didn't have anybody telling us, "Hey, here's what you guys need to do." It was really grassroots, which was really exciting. We were kind of flying by the seat of our pants. I think I realized that there's times in your career where you're called to lead and somebody taps you on the shoulder and they say, "Hey, we're going to give you this title. Here's the job description, here's the expectations." Then, there's other times when that calling really has to come from within, and that's that level of determination and commitment that I learned about myself. So, I think I learned that I'm always going to find a way to lead from wherever I sit, and that I'm not going to wait to be called upon.

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In terms of across the firm, the other things that I think we took away was collaboration across different functions within the firm. Every Monday morning, we would meet for an hour. We had a Zoom call that we would have folks from our accounting and audit department. We had people from tax, from HR, from different business advisory functions within the firm. And again, we would just talk about what are our clients facing this week. At that point, the landscape was really shifting beneath us and every two or three days, Treasury would come out with something or there'd be a new economic stimulus or new regulatory issue, workforce matters were absolutely huge.

It really was great to see the level of content and the quality content that we got out of that, through that collaboration around this idea of what our clients are going through, and then let's talk about it from all of these different perspectives. It led to some really high-value content that people seem to really enjoy.

Jean: I loved everything you said, especially about your ability or recognizing to step up as a leader and not wait to be asked to be that leader. I think that's such an important message for everyone who listens to this Capstone Conversation. If there was ever a time for marketing to shine within accounting firms, it has been these past two years. I believe there are many partners in our world now who perhaps didn't either understand or appreciate what their marketing professionals brought to the table, and they do now.

Allison: Yeah, it was. It was such an energizing time, it really was. I just felt so purpose driven. The other thing that was kind of like a nuance to all of this that I think actually was what distinguished, what differentiated our webinar series was, I can remember the Friday before we were about to go on and really thinking about, what is this message that we're sending? And we were going through, collectively as a society, we were at home. We were completely disrupted. There was a real and palpable fear that was among people of the unknown, but then there were also all of these just weird things that we were experiencing. Like, the toddlers interrupting Zoom, and the dogs barking during the Zoom meeting. It was like, "Oh, my God. What are we going to do if my dog barks during this Zoom meeting?" You know, everyone concerned about keeping that level of professionalism.

And, we were looking for toilet paper, and trying to get our hands on that, and all of these weird things. It really occurred to me that we needed to be human first and realize this place in history that we were experiencing something that was completely unprecedented and that we couldn't just play it straight. We needed to acknowledge, "Hey, this is something we're all going through. These are weird times to own a business. We're all in this together, we don't know exactly what the next week is going to bring." I talked to that and I coached our subject matter experts on that, our host, the people who are hosting.

And they said... You know, and luckily, these are wonderful people who just, they have that natural warmth to them. But it was really great because we were able to connect on a human level and acknowledge what we were all going through, and then also inserting a little levity into this situation, like, "Hey, the dog starts barking, like, that's okay. You know, hey, sorry guys, that's Ralphie, that's my Shitzu. He gets a little excited, or whatever." I think that's such a little thing, but I think it's something that marketing directors can bring to their firms is allowing folks to see the human side of you and really make that connection and know we're really in this together.

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Jean: I would like to think that we're being a bit kinder to each other these days, because you're right. In the old days, if a dog barked, you'd be really annoyed, like what a disturbance, why they're bothering this call? Now it's like, oh, what kind of dog is it? What's its name? I was on an AAM Zoom yesterday and one of the participant's cat walked right across her desk and nobody said a thing. Everybody saw the cat and nobody thought anything about it at all. I hope that we're kinder and that continues forever.

Allison: Absolutely. It's definitely a blurred mind there between working home now. I found, in some ways, those relationships can be stronger because of it.

Jean: Without question. I completely agree with you.

Allison: I think the fourth thing, if I can name a fourth thing, a little bit more practical coming out of COVID. We were doing a lot of webinars, we were engaging clients, non-

clients through our website. So, tons of website engagement and that sort of thing. We really didn't have a CRM that was...we had a CRM that worked more like a database, but where it really wasn't functioning to track pipeline and track opportunities and being able to identify based on people's use of our website, whether or not this was somebody we wanted to follow up with for business opportunities.

We really seized that opportunity. Like you said before, Jean, about marketing getting a lot more credibility. I think the case even here at RKL where I think that we have a lot of respect for our marketing team, but we were really able to share that story about how a technology platform, marketing automation, CRM, would allow us to have that real-time visibility of what's going on with our clients, with our prospects, and that sort of thing.

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That was a huge plus that came out of all of this, we found the right timing to really sell that idea. We're on HubSpot, which is, obviously a lot of firms have adopted HubSpot. We find it to be really user-friendly. We've gotten a lot of really great traction for that. So, that was the fourth and final thing that came out of COVID that I think will continue to benefit our firm.

Jean: That's awesome because your partners and staff, they'd like to see that information, they'd like to see the evidence and the numbers and everything of what you're doing. I'm a HubSpot partner, so kudos on selecting HubSpot. That was great. It's very powerful.

You've been with your firm a while, it's 10 years, if I'm remembering right. You have this deep knowledge about accounting marketing and how firms run. What do you think is the biggest challenge in marketing a CPA firm?

Allison: I think the challenges and the opportunities are kind of one and the same. Industrywide, the challenges are changing consumer behaviors. The buyer's journey is just increasingly online. You've got commoditization of compliance services. The war for talent is just absolutely ramping up and the marketer's role in developing that strong employer brand that's going to differentiate you. The role of technology, diversity, equity, and inclusion, there's so many challenges, but I also look at them as opportunities for our firms because I think marketers are uniquely positioned to really help their firms adapt and advance. And, I think one of the things is even just in service development, right?

So often marketers are tapped to bring a service to market, to create awareness about service. But, I was really heartened to see at AAM this year, there was a lot of discussion around client experience and how marketers can actually be at the table developing those services in collaboration with their client-facing professionals and their partners. I think that is the challenge and the opportunity is not only being comfortable or willing to change, it's

being willing to disrupt yourself. I think that's the challenge for marketers, is to say, "Do I actually need to disrupt this process and think about this completely differently?" Hopefully, of course, not just for the sake of disruption because it's a buzzword or whatever, but I think it's a really exciting time to be part of the industry. I think it's really exciting to see how those conversations are expanding, particularly at AAM. You know what I mean? We're not just playing in that marketing space, we're really getting that seat at the table.

Jean: Absolutely. In the decades since firms have been allowed to promote themselves, the discipline of marketing has just become so much more sophisticated, real talent is entering the industry. Let's face it, back in the day you got a marketing job at an accounting firm because you couldn't find the job you wanted.

Allison: Oh, no. Really?

Jean: Oh, gosh, I could tell you stories, Allison, but I don't want to bring you down. We've come a long way in this. I'm getting a little bit off track here, but let me ask you, I mentioned that you have a team of nine, and you're mentioning all of these challenges and opportunities and things that a marketing department can be involved with within a firm. So, speak to those marketers listening or watching, how did you gain the buy-in to make those hires and to build your team?

Allison: So, incrementally, you know what I mean?

Jean: Just think about the first one. Remember, if you were on your own, because I know that there are single marketer director firms that would love to have permanent help, and I think you can give us a really good example of how you did that.

Allison: I have to think that through because I have grown. We went from three, myself, a marketing coordinator, and another marketing manager. I'm really fortunate to work for a firm that I think really values marketing and values firm administration in general and recognizes that with our growth goals comes hiring in those departments. But for some of our more recent hires, I think it comes from just being able to report in on the successes that we've had. And, sometimes I've done presentations for our CEO, where I've talked about where are we currently ... This is one trick up my sleeve, but I feel like might be where are we currently? What are we able to do in current state analysis and then future state analysis? Where are we going?

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So, speaking their language and coming back to, what are the business objectives that they're talking about? We're thinking about bringing on a new firm, if new firm is merging in, so you're going to need that geographic awareness or we're going to be doing accounting outsourcing, we're doubling down on accounting outsourcing. So, we're going to

need resources, like video, onboarding tools, and things like that. So, doing a current state, future state analysis, and then showing how that hire is going to get you to the place that your managing partner or your partner group wants to be is one way that I've gone about that.

Jean: That's great advice because it shows that the marketer is thinking strategically as well and matching their department with the overall goals of the firm.

What factors or skills do you see in other marketers, accounting marketers, that enable them to be successful with their firms?

Allison: From a skill development standpoint, I really think that thinking digitally first is just critically important and that's regardless of where you sit. So, if you're a senior leader who is leading your marketing team, or maybe you're in a larger firm and you have a more specialized role, you're in PR or you're in event management, I think that ability to think digital first, how are you engaging folks, either through social media and through other digital platforms, how are you measuring the results of what you're doing through the technology platforms that are available to us now is critically important.

For some of us who've been in the industry for a little bit longer I went back and got an accreditation from the American Marketing Association from the Digital Marketing Institute because I really felt like I needed to step up my game a little bit, as well. I mean my first press releases were the fax machine and I was just that lady that stands by the fax machine and...

Jean: What's a fax machine?

Allison: As far as personal characteristics, I think it really comes back to just like having I see this in some of the folks at AAM who I really admire, and I really see this a lot with my own marketing team. I have nine people on our team, but we have three just exceptionally talented managers. So, I learn so much from them, as well. Having a consultative mindset is really important. I think just getting beyond what's being requested of you and really getting to root cause and what's the expected outcomes and expectations that a partner has? Feeling comfortable asking questions, you know? I think you could call it curiosity, but I think it's a little bit more than that. I think it's really being like a true invested partner, like, "I'm here to help you with this particular outcome, and I care just as much about the results as you do, and I'm just as invested."

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So, that's something that I try to instill in our marketing team. Certainly, there's times when a partner will come to you and say, "We really need a brochure." If you're really asking the questions getting down to the bottom of it, a lot of times you don't end up with the brochure, you know what I mean? You end up with a social media campaign, or you end up

with an event sponsorship or something like that. So that's one trait. The other thing I think that's really helpful is to be able to tap into patience and tenacity.

The patience part, which is always a little bit harder for me, but just like being able to celebrate those small wins when you have them and being able to see incremental success. I had a mentor a few years ago who told me, "Allison, you're always looking forward, and that's great, but you're going to need to look back every once in a while to see how far you came." So, having that patience, being able to celebrate the small wins is really important in this industry because there's going to come times that you're just not getting the buy-in that you need, and you're not getting... You know what I mean? You just feel like your ideas aren't going anywhere.

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Then, there's the tenacity part of being able to kind of read the room and know, "When is it a good time to really push forward on this particular initiative?" And I'm going to advocate, and I'm going to be outspoken in this moment because the moment calls for it.

Jean: You've got to pick those moments, right? Because you can't approach things like that all the time. I used to use the term, you have to pick your battles, right? Some things are more important or higher priority, and there's times that you need to say, "Okay, I'm just not going to win on this one, that's good, but the next one's going to come up."

Allison: Not a win today, but maybe three months from now, maybe a year later.

Jean: Exactly. So, tell us, what would be your best piece of advice for accounting marketers?

Allison: I think it goes back to uncovering the why behind what is being requested of you or initiatives that you're being tasked with. When you understand what's driving something, maybe we want to expand awareness in this market or we need to create greater awareness around this service or we're trying to expand existing relationships, whatever it is, I think being able to get to the bottom of what's driving that request and understanding what outcomes are expected is going to allow you to then use your toolbox and say, "Okay, these are the tools that I have that we can employ to get those results." I think that's one thing.

I think the other thing is just double down on relationships. That is so, so important, relationships within your firm, relationships outside your firm. I think this profession has come a really long way for marketers, but the reality is the concepts and the ideas that we're bringing to the table, a lot of times, they do feel foreign to the people that we're working with, right? And, these are folks that can have black and white thinking and they're very detail-oriented, analytical, and here we are with our palette of different colors that we're working with and the creativity and all of those things. It just can feel a little bit foreign to them.

So, I think to be able to connect with, find your tribe within your firm, those people who either are just excited to learn a little bit more about what you do, or maybe they take an interest in BD or marketing. A lot of times it can be folks that have more aggressive growth goals, they might have new services that they're representing. Create relationships with them because I think those are going to be your folks that are going to be your allies when your ideas are falling short. I love working in this industry, but the reality is if you're expectation is that you're going to walk in on day one and everyone's going to say, "Wow, she really knows her stuff about SEO." and, "Boy, does she really get it, her messaging is on point." They don't know how to work with you, and you have to teach them how to do that. And that's built on strong relationships, and that's built on that shared understanding of, "I understand what's important to you, and I'm going to leverage my skillset to help you achieve that."

"They don't know how to work with you, and you have to teach them how to do that. And that's built on strong relationships ..."

Jean: What I'm hearing underlying everything you just said is the need for a marketer to be able to communicate with their partner group and people within their firm. You already mentioned needing to ask those questions to get to the bottom of what the partner really wants or needs. They need to know how to answer those questions, they need to know how to listen, and the patience and those things that you just talked about. I don't want to lose sight of that. The communication aspect is really important.

Allison: It is. And, just don't make assumptions. You know what I mean? I tell my team that all the time, don't assume you're selling them, like, open up this application. You're going to want to be more explicit about how you open up the application. They're smart and they're busy and I have all the respect in the world. I don't say that in a disparaging way, but it's like, really help them because we need to build that bridge.

Jean: Absolutely. So, on the flip side, what would be your best piece of advice for managing partners?

Allison: My best piece of advice for managing partners is let your marketing people be the trusted advisors that you want them to be. There's so much talk in this industry about helping our client-facing professionals really become trusted advisors and yet there's a lot of firms where marketers still don't have a seat at the table. I think we are making great strides, but I think it starts with having the right person in that role, and you're going to want to find somebody who isn't just a technical expert, but they're somebody who really wants to dig in with you and understand what your vision looks like and what your objectives are and how they can leverage their skill set to help you move forward on those objectives.

If you do have that person in place, let them advise you, let them consult you, bring them to the table. I think of great marketers no different than how we think of as our high-performing client-facing professionals. They want to be trusted advisors, they want to be

the first to call. If you're treating your marketing function as if it's just another function within the firm, or it's somewhat of a commodity, you're going to limit the value that you're getting out of your marketing team.

Jean: Absolutely. Let me just clarify one thing, because we hear that term a lot, get the seat at the table. I look at that as not needing to be a partner within your firm as a marketer, but to have the respect that you're at the table during those strategic discussions so that you can provide input towards the future of the firm. Would you define it the same way or different?

Allison: A hundred percent, Jean, 100%. I often say for myself, and I'm somebody who sets high goals for myself and really wants to be tapped into on a strategic level, I don't need the celebratory Yeti mug. What I want is just to be tapped and said, "Hey, we want to bring you in because we really value your perspective on this." That is engagement to me. So, I totally agree, you don't necessarily...certainly getting the title is nice, and we see that with a lot of firms, our bringing marketers and BD folks into that C-suite or that partnership role, but I think more than that, it's demonstrated through being able to be tapped and people to care about your perspective.

Jean: That's awesome. Well, we've been talking today with Allison Schlegelmilch, the director of marketing at RKL LLP and the 2022 AAM Marketer of the Year. Allison, congratulations, again. Thank you for your time today.

Allison: Thank you so much, Jean. I really enjoyed talking to you.

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