

A Capstone Conversation with  
Lucas LaChance, CPA, CIA



Director of Practice Growth  
Lane Gorman Trubitt, LLC



CAPSTONE MARKETING

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Hello, this is [Jean Caragher](#), president of [Capstone Marketing](#). I am happy to be talking today with [Lucas LaChance, CPA, CIA](#), Director of Practice Growth at [Lane Gorman Trubitt, LLC](#), or LGT, who was recently named the [Association for Accounting Marketing 2023 Marketer of the Year](#).

In his role at LGT, Lucas oversees business development and sales, marketing plan development, public relations, client experience, as well as social media, staff training and strategic planning. You're a busy guy, Lucas.

**Lucas:** Yes.

**Jean:** Prior to taking the role of Director of Practice Growth in 2015, Lucas spent the previous eight years at the firm as an auditor. And I'm here to tell you, this is my first Capstone Conversation with someone that transitioned from auditor to practice growth. So, I'm really excited about this. Lucas currently serves on the AAM Finance Committee and is their incoming 2023-24 Board Treasurer. Lucas, congratulations on being named AAM's Marketer of the Year.

**Lucas:** Well, thank you very much. It's great to be here this morning.

**Jean:** Now, were you surprised when you received this award? Tell me your reaction, how it went down.

**Lucas:** I was floored just because I know the past winners and even my colleagues, all of whom are incredibly deserving. So, I was really, really floored. Rhonda called me or actually emailed me about a week ahead of time to give me a little bit of time to prepare a few remarks, but other than that, I didn't know right up until pretty much go-time.

**Jean:** Wow. So, she asked you to prepare but didn't tell you that you won?

**Lucas:** No, she told me that I'd won. She said, "You have about three to five minutes at the actual awards ceremony if you want to talk." So, I prepared a couple of notes ahead of time.

**Jean:** It's always been a question of do you tell them or not tell them, like, are they totally surprised? Obviously, they've decided now to give you a little bit of a heads-up. Did you appreciate that?

**Lucas:** Very much so. Of course, I was writing my remarks on the plane on the way to Salt Lake City, so it was right to the last minute for me, as well.

**Jean:** Well, I first want to go off-script a little bit. Can you tell us briefly how you made that switch from auditor to practice growth?

**Lucas:** It was unique. I'd spent about eight years as an auditor coming up. I was a senior manager on the audit side. Actually, I had given my notice and left the firm. I briefly worked for Thompson Reuters as a technical editor creating the books and the online resources that accountants use to audit not-for-profit organizations and other companies. The gentleman who was in my role before me left, and the managing partner and one of the other members of the Policy Committee called me and said, "Let's go to lunch."

**“Actually, I had given my notice and left the firm.”**

We went to lunch, and they laid out what they had envisioned. They retooled the position completely, including adding a partner track to it so that I would have the opportunity to come back to the firm in a completely different role and still have an opportunity to make partner. I thought, "Well, okay, you know what? I miss the firm anyway." I was glad to have an opportunity to come back but knowing that I could still do it and make partner was something that was very important to me as part of the negotiation to come back.

I was really, really happy and I thought, "You know, worst case scenario, I'm still a practicing CPA. If I come back and this doesn't work out, then I can go back and be billable. I mean, I can go back to audit or do something else at the firm itself." It was a gamble on both sides. It required a lot of trust.

**Jean:** It did, but these days there is a partner track for marketers and business developers to become partners, and it wasn't always like that. That's another exciting change that's happened in this industry.

**Lucas:** Personally, I feel that I had an advantage just because I was a CPA and had the license. A lot of my counterparts who are not CPAs all still have been able to, through their careers, establish a seat at the table and really be part of those C-level conversations. That's where marketing and business development needs to be.

**Jean:** We still spend a lot of time talking about that and what needs to happen, the risks that the marketer needs to take as well, to have the confidence to grab that seat, so to speak. Given this interesting background, tell us what you believe is the greatest challenge in marketing CPA firms.

**Lucas:** It's the talent. It's getting the right people in at the firm. Whether you're staffing specifically for your marketing or practice growth group, or staffing for the firm overall, specifically in Texas, there just are not enough CPAs. Being creative about tapping into markets is important, and human resources and marketing have to work hand in hand to develop the strategies that get into those right areas where we can tap into the right numbers, whether they're students coming through internship pipeline or professionals that are already established that are looking to make the jump. Being visible is critical in that, and working in a partnership with human resources is essential.

**Jean:** It's so interesting you say that because I'm surprised about how many marketers are not teaming up with HR. HR does their thing and marketing does their thing, and that's a missed opportunity.

**Lucas:** It is. Honestly, given the functionality of our firm, I don't know how that's possible. I caught a really great session, though, at AAM that talked about the intersection of marketing and human resources, and I downloaded the presentation to keep for future reference, but we have a great partnership.

Our HR group, I feel, is wonderful. It's led by [Jillian Hawkins](#), who is a very dedicated, long-term member of the firm, but we have two recruiters that focus on experienced recruits as well as a second recruiter that works on the pipeline through colleges, through the internship programs. They have been great. I've been able to go out and spend some time on interviews with them, and they're very, very professional, and great at what they do.

**Jean:** Don't you think there's been more attention paid now to CPA firm brands given this talent crisis and the information that potential employees need to know about a firm before they make a decision?

**Lucas:** Absolutely. It comes down to what is your visibility in the market. I think I read a statistic that I believe there are 147 accounting firms in the Dallas-Fort Worth Metroplex, the Dallas-Fort Worth area. How do you cut through all of that noise? Then, with the internet, the very first thing that any potential candidate does, whether they're early in their career or established, is go and search.

They go and check you out on [Glassdoor](#), they go and check and see what your footprint is, your areas of specialty. I find that a lot of candidates come to the table already armed with a number of questions about the culture of the firm, what are we doing. What are our values? I think this is indicative of folks that are looking for something more than just coming and doing the job and going home.

**Jean:** I couldn't agree more because in the branding work I do, we're always tackling the vision, mission, core values and I tell practitioners, this is not just some warm and fuzzy stuff that marketers want you to create. It really does have meaning. I agree, especially since our experience with this pandemic, lots of people are giving a lot of thought to how they're spending their time and what they're doing and who they're doing it with, and that just makes those components that much more important for firms to lay out and live. That those items are authentic and true, and not something that's been made up.

**“Even if you feel that DEI is a fad, there still is an economic case to be made for having a workforce that's engaged.”**

**Lucas:** I think what we saw through the pandemic laid a foundation for what is now a much broader discussion on DEI, and what does it mean for employees to bring their authentic self to the office in whatever capacity. Even if you feel that DEI is a fad, there still is an economic case to be made for having a workforce that's engaged. Engaged employees will

stay longer and they will work harder. If that means that you need DEI policies to do that, then that's something that firms should be investigating pretty significantly.

**Jean:** Tell me the changes that you've noticed in accounting marketing. What's changed the most from the time you started in this role until now?

**Lucas:** Two things come to mind off the top of my head. One is an external force and the other is an internal force. The external piece is technology. Right now, the buzz is all about ChatGPT, but, honestly, marketing tech stacks have been evolving with new products on the market every year. I feel like with everything that we are really asked to do in marketing and business development, we're always looking for the tool that's going to make us more successful or at least more efficient.

So, I see the evolving tech stack being very important. We're looking at it, as well. As a matter of fact, I've seen a number of them already and we're joining the group and hosting our own webinar on ChatGPT in eight days. I think technology as an external force is a very significant aspect of how I'm seeing everything change. When I took over the group in 2015, internally we faced a PR crisis. The firm kind of viewed practice growth as a collection of party planners and people who make things look pretty, and changing the understanding of the role that practice growth plays in the long-term success of the firm was a process and it was executed.

**“It's been a long process of making commitments, following through, demonstrating the benefit and, because we work with accountants, tying that back to ROI.”**

I am part of an amazing team of brilliant professionals. They teach me more and more every single day, which is wonderful. It's been a long process of making commitments, following through, demonstrating the benefit and, because we work with accountants, tying that back to ROI. Like you mentioned earlier, it's not just warm and fuzzies, but it's difficult to translate that concept, I feel, to a group of folks with an analytical standpoint as opposed to more of a creative one. Fortunately, there have been a number of changes in how the firm views the role of practice growth over the last seven or eight years, and we really are seen as an integral part now, and as part of the entire firm, not just party planners.

**Jean:** That's so wonderful to hear. If there was ever a chance for marketers to shine in accounting firms, it has been these past three years. We all saw teams of people - and those individual marketers in their firms - really showing up and producing content, communicating with clients, dealing with crises and client situations, and internally keeping people motivated. A lot of marketers' and business developers' partners really opened their eyes to what they are contributing to their firms. Unfortunately, for some, it took a pandemic for that to happen. But overall, I'm going to take that as a win.

**Lucas:** I think of one instance in particular. Before we even hopped on, you and I talked about [Katie Cook](#), she was Lyles formally, now she's Katie Cook. We hadn't done a whole lot of webinars. We had done some, we had dabbled. Then, the pandemic came along, and

people needed information about PPP. All of a sudden, the regulations were released, and everyone was clamoring for information.

Katie, along with [Josh Woods](#) who is our marketing manager, and one or two of the other professionals, the accounting professionals got together, and in 48 hours digested and pulled together a webinar that hosted for more than 500 people. Katie and Josh did it on a dime. They learned the ZoomInfo platform in 36 hours. That's all they had, but it took the pandemic to do it, and they executed it incredibly well. That kicked off, "Okay. You know what? We can do webinars. All right."

**Jean:** That's right. What's the big deal?

**Lucas:** Right? Nothing like the first one, right out of the gate.

**Jean:** Lucas, I know you've grown a network of accounting marketers through AAM and otherwise. What factors or skills do you see in those folks that contribute to their success?

**“I think it's that most of us really learn from and listen to the wisdom of those who were in those shoes before us is the biggest part of it.”**

**Lucas:** I think it's that most of us really learn from and listen to the wisdom of those who were in those shoes before us is the biggest part of it. Our firm right now is a part of Prime Global. We're relatively new to that, so I'm still working through and developing my own network through [Prime Global](#).

Previously, we were members of [Leading Edge Alliance](#). When I first started in this role, that's really where I cut my teeth. So, I've got a support system of folks from LEA that we talk all the time still, even though now I'm an in-law. We still talk all the time about, hey, has anybody run into this? Or have you seen this in your market? Or do you have any tools that will help me with whatever the issue is? We rely on one another.

Even though now with mergers and acquisitions of firms, we have overlapping geographies, there still is trust there. One of the smartest women I know is [Jen Lemanski](#), and she's down in Houston with [PKF](#). Our firm just opened up an office in Houston, but Jen and I still talk all the time. It's having that network of people that you can trust, that you really can rely on, and folks that have been doing this a lot longer than I have, there's a lot of institutional knowledge there that I just try to soak up as much as I can.

**Jean:** I'm proud to say there's quite a history now for accounting marketing and a lot of really smart people that have done wonderful things. I have always found AAM and other organizations full of people who are willing to share information and ideas with you. There are some organizations, they hold information pretty close to the vest, but that's not AAM. Just like you were saying, you talk and share ideas and ask for advice. It's wonderful to have that network.

**Lucas:** AAM has been a wonderful organization. Similar to Prime Global and LEA and I'm still working on and developing my network through AAM, as well, but I have never run into anyone who'd said, no, I'm not gonna be able to help you.

**Jean:** That's just one of the outstanding things about it. So, tell us from your own perspective, which of your personal skills contributes to your success as a director of practice growth?

**Lucas:** I would probably say that mostly that I'm a people person. Before I got into public accounting, I worked in internal audit. And this should be...

**Jean:** That was an exciting spot.

**Lucas:** Yeah. You learn really quickly how to be diplomatic when you're the internal auditor and you're coming to visit a department. I established really early on my approach for management and people relationships is to come from a position of helping. I'm never going to be the I gotcha guy. I am here because there's an issue and I need your help with how to resolve it appropriately.

**“We need to work together to be successful in whatever endeavor we're doing. Let's roll up our sleeves and let's do it.”**

That's been my philosophy, whether it was internal audit or rehabbing the reputation of our department when I first took it on, that's been my approach. We need to work together to be successful in whatever endeavor we're doing. Let's roll up our sleeves and let's do it. So, I think that's probably been the thing that's been most beneficial.

Of course, it doesn't hurt that I'm also an accountant and I can speak the accounting language. I am kind of unique in that I can translate what marketing needs versus what accountants are looking for. Being honest and forthright in my approach, I think, has been critical, a bit pivotal in success.

**Jean:** That's a great approach because many times marketers are trying to get partners and managers to do things that they're not comfortable doing. There's already that feeling like, I'm not excited because I'm a little intimidated, or maybe I'm even a little scared about it. I would think when they know you have their back, they might be willing to take that step out of that comfort zone.

**Lucas:** Well, when you come to an accountant and say, hey, we'd like to put you on camera for a webinar, you know, people fear heights, what is it? Heights, spiders, and...they would rather face heights, spiders, or death than do public speaking. Public speaking is the thing that most people are most fearful of.

So, when you say, "Hey, I'm gonna put you on camera and we're gonna broadcast this out, and you're gonna have an audience looking at you," it terrifies a lot of people. Doing whatever we can to put them at ease, whether that's dry runs or whatever is necessary,

getting them comfortable to let their expertise shine. They're the subject matter expert. Let's get that out there for them.

**Jean:** Absolutely. So, tell us, what is your top priority initiative right now?

**Lucas:** Moving into our new Houston market, I think is the thing that is... 2022 was a very tumultuous year in a good way. There just was a lot of change. We acquired two firms one in January of '22, and one in February of '22.

Then, we hired a partner to lead our Houston office and opened that officially early in '23. We've onboarded our clients from mergers or acquisitions, which was great, but it was a fairly intensive process and then we rolled right into another major firm initiative. When you're down in Houston – and we're trying to establish a presence – it's very much an awareness campaign, and marketing, and industry specialties, and getting in front of the right folks and establishing those COIs.

It has been many trips back and forth between Dallas and Houston. Now that I've figured out the right flights to take and the right airport to fly into, things are starting to get easier. Right now, the focus for the firm overall is making sure that the Houston team is supported and successful and that they don't feel like a satellite office. That you really are culturally the same as Dallas. So, if you were in Dallas, you could plug in here or you could plug in in Houston and have all the same resources and everything else that you would need to be good at what you're doing.

**Jean:** That's such a pivotal role that marketing departments or many of them are playing these days with all of the mergers that are going on. It's so important to have the marketers as part of that team, right? It's not just about the brand, a lot of it is about the culture and the people and creating that team.

**Lucas:** And communication, internal and external-facing communication. Because acquisitions, even if you are the acquirer, there still is a lot of change that's introduced with that process, and it comes with, sometimes, redundancies. It introduces an element of uncertainty, and that makes people uncomfortable. So clear, forthright communication is internal and external is one of those things that's very important. A lot of that comes through the marketing group.

**Jean:** I think it's impossible to over-communicate on things like that. Would you agree?

**Lucas:** I agree. More information is better.

**Jean:** Before we get to my final two questions, I want to throw another one at you that we did not plan ahead of time. In the news release that AAM sent about your winning the Marketer of the Year, part of that description included the firm's growth, and that through digital marketing within inbound marketing specifically, you achieved your goal at 143% growth. Are you willing to share with us a little bit about how that happens?



**Lucas:** Sure. So, for practice growth for the business development piece, there are three components. I do new business origination. Part of my job is going out and finding new clients and bringing them to the LGT community. We also have a director of business development whose name is [Emily Ackerman](#), and she is 90% dedicated to outbound sales.

She and I each have individual goals that are part of the contribution to the overall firm's success. However, I have challenged our marketing manager, Josh Woods, to also have new business goals. His goals are utilizing digital media and digital marketing to drive people to the website or to call us. Those inbound leads are tracked separately, and they're expected to generate whatever the year is, X number of hundreds of thousands of dollars in revenue through inbound marketing alone.

Whenever anything comes into the firm that is not part of a relationship that somebody already owns, it's funneled to me. I take them through the vet amount and then take them through the proposal process. If we close that as a new customer or as a new client, then that goes towards Josh's inbound marketing goal.

**“ ... we've had a lot of success with our digital marketing, utilizing paid campaigns and organic campaigns generally on LinkedIn.”**

We've had a lot of success, and I credit him, honestly, with the philosophy behind it, but we've had a lot of success with our digital marketing, utilizing paid campaigns and organic campaigns generally on LinkedIn. That is our primary target platform. We also have a presence on Facebook, although it's not quite as strong. We do have a presence on Instagram, as well, but LinkedIn is where we really concentrate our efforts.

Through that, both organic and paid, we were able to generate enough leads that he not only beat his goal, but it was almost 150% of his goal. He's incredibly excited about that. It was a great year. We landed some really good quality big-fish clients that found us through marketing searches, accounting searches online, so...

**Jean:** It's really amazing. I know it's happening, but it still amazes me how our marketing world has changed over these decades. I think what we do, the basics are still there, but how we can do it and the tools that are available to us to do it have changed completely. Or nearly completely. I've been around long enough that when a prospect called a couple of partners put some print brochures in their briefcases and they drove there and told the story, right? They got to tell the story of the firm, and nowadays, as we both know, those prospects are doing their homework, too.

Just like you were saying, potential employees are already researching the firm, they have their own questions. Prospects are doing the same thing. We've talked about communication and external communication. Firms need to be careful about telling their story and trying to make that connection with the prospects and being clear on what types of prospects you're looking for and what their experience might be in working with LGT, in this case, as opposed to one of the other 136 firms in Dallas. I think that number's, right?

So, to look back on it and to look today, it's just so interesting and powerful to me how it's grown.

**Lucas:** It is. Then, the other piece to that, though, is since we're tracking the source of our different prospects, that ties back to, and makes my little accountant heart happy because I can tie ROI back to our spend. If we're bringing in a couple hundred thousand dollars in new business through digital marketing, then my budget is a lot more palatable when I submit it to the Policy Committee and be like, "Okay, this is going to be my spend, but this is what it can generate." There's a lot more buy-in when I can tie those things specifically together. That's been a process, just trying to figure out what tools are necessary to make that happen.

**“Okay, this is going to be my spend, but this is what it can generate.’ There's a lot more buy-in when I can tie those things specifically together.”**

**Jean:** Now, do you have a content marketing platform like HubSpot or Marketo? Which one...

**Lucas:** We use HubSpot.

**Jean:** Hubspot, okay. I use HubSpot. I'm very familiar with HubSpot, too. That was a great choice. It can just do so much, right? With all the data and it just... Yeah. Awesome.

**Lucas:** It was leaps and bounds ahead of what we were using before, which was two separate siloed programs that didn't speak to one another. Every time you had a new prospect, it was putting it in one system and turning around and putting it in manually in another system, and HubSpot has just been a revolution for us.

**Jean:** Well, at least you didn't say all your stuff was on an Excel spreadsheet.

**Lucas:** I still have some of those partners who are using the Excel spreadsheet or a lot of little tiles in Outlook.

**Jean:** Oh, my gosh. So, last two questions. What would be your best piece of advice for accounting marketers?

**Lucas:** Within your firm, to the extent it's possible, try to specialize. We have four industries that we primarily serve. One of the things that I'm asking is that each of the people in our team takes one of those industries as one that they really want to work with. We have quarterly industry meetings that are cross-functional. We bring in audit or assurance and tax and consulting and business advisory.

The teams are all cross-functional, but they're all industry driven. I have been pushing for different members of our team to pick an industry that they like and really immerse themselves in it. Then, also cross-train. Not only is it good for the department overall, just when people take PTO so that stuff doesn't stagnate, but cross-train. I want to cross-train our team so that eventually they have the skills they need to, at some point in the future,

lead their own team. To learn those types of things, you have to have exposure to them. You need to be able to work on events, to work on publishing, and to do a little bit of social. So, cross-training and all those different things and becoming proficient in them is important.

**Jean:** That's awesome. I see that's also the way firms are growing their teams. They're hiring digital specialists, writers, or designers or whatever that is. There's still a lot of one or two marketer firms that do everything, but you see more these days of teams being built with these types of specialists. There is an opportunity to get to learn what the other people do.

**Lucas:** Yes. Absolutely.

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

**Lucas:** This one's easy. Listen to your team. It ties back to the comments about the seat at the table, but we hear a lot of verbiage, and it's legacy verbiage I find in a lot of firms about the division between the professionals and the administrative teams, which I take issue with from the get-go. Everybody on my team is a professional. They're all degreed. Everybody has been through trainings or certifications.

**“The old school distinction between professionals, meaning the CPAs and the non-CPAs, I think get away from that type of terminology and understand that everybody is bringing a valuable skillset set to the table.”**

The old school distinction between professionals, meaning the CPAs and the non-CPAs, I think get away from that type of terminology and understand that everybody is bringing a valuable skillset set to the table. Then, listen to them. Listen to the folks that are in your marketing and business development and practice growth groups. They have the expertise that the firm needs.

I'm fortunate enough where I'm at the table and can be the advocate for our team, but there are firms where the highest level or highest-ranking marketing or business development person isn't in those conversations. It's important to listen to what your marketing and business development team is saying. They know what they're doing. They know what the industry is. Invite them to those conversations. You'll be surprised.

**Jean:** Let me tack on one extra question, because you just brought up an important point. For those marketers that don't have a higher-level person like you at the table and they're trying to get there, what would be your number one encouragement or task that they should do to get themselves there?

**Lucas:** Find an advocate. Find somebody who is open to those. This is a terrible generalization, but I'm going to say it anyway. If the group of decision-makers is all partners, or if your firm has principals, then align yourself with someone, probably a younger-level partner, but someone who is in those conversations to be your advocate and work with that person to develop at least some talking points that that person can bring to the

conversation. Someone to introduce the topics and the points for discussion and open the door. That's all you need. If you're not in those conversations yet, then partner up with someone who is.

**Jean:** The other thing I'm hearing is that the marketer needs to decide that that next level is something that they want, and they need to proactively go after it. Would you agree with that?

**“After a certain point, regardless of where you are in your career, your career is your responsibility.”**

**Lucas:** Absolutely. After a certain point, regardless of where you are in your career, your career is your responsibility. You have to take the reins. You can do that in a very polite way, but you have to take the reins and determine what's going to be the best for you in the long term. If that's staying at the firm where you are, that's great. Then, make the changes you can make within your scope and then align yourselves with others who feel similarly to have the discussions further up.

**Jean:** Excellent. I think that's a great point for us to end with. We've been talking today with Lucas LaChance, Director of Practice Growth at Lane Gorman Trubitt, who was recently named the 2023 AAM Marketer of the Year. Lucas, congratulations again, and thank you for your time today.

**Lucas:** Thanks, Jean. I appreciate it. I appreciate the opportunity.

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