

A Capstone Conversation with Lily Morris



Communications Specialist
Johnson Lambert



CAPSTONE MARKETING

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Good morning, everyone. This is [Jean Caragher](#), president of [Capstone Marketing](#). I am excited to be talking today with Lily Morris, Communications Specialist at Johnson Lambert, who is the [Association for Accounting Marketing](#) 2023 Rookie of the Year.

In her role, Lily produces monthly newsletters, oversees the Diversity, Equity, and Inclusion Committee, and runs an internal intranet-like Google site, which we're going to talk more about, Lily. It's just such interesting stuff you're doing there at the firm. Lily also develops social media content specifically around recruiting, including co-developing a brand-new social media strategy on TikTok and targeted LinkedIn advertising to reach potential new hires. And I know folks are really going to want to learn more about that, too. Lily became a member of AAM in 2021 and joined the Strategic Communications Committee in 2022. Lily, congratulations on being named Rookie of the Year.

Lily: Thank you so much. I'm so excited to be here and really looking forward to this conversation with you.

Jean: So, how did it feel when you heard your name, and you won this award?

Lily: Well, I was very surprised, and anyone who was there at the ceremony probably knew I was surprised because I didn't go up on stage at first when my name was called. Yeah, I wasn't really sure of the procedure, to be honest, but I was definitely thrilled and super excited. But yes, very surprised.

Jean: Well, it's very well deserved, and we're going to talk about some of your accomplishments during this conversation today. But let's start off with what you believe is the greatest challenge in marketing CPA firms.

Lily: Well, just through talking to other accounting marketers and conversations that we have on our team at my firm, it's that not many marketing teams have the budget and resources to do all of the things. Not every team has a budget and people committed to just a video production project plan every year, or they don't have a person specific to PR or a team specific to social media. It's usually just a few people doing a lot of different things. And that can be really challenging to feel like you're doing all of the things and doing them well. And then it's also how do you continue to evolve and upscale while maintaining what you've been doing and all of those key touch points that we're always talking about in marketing. And one of the things that we've done recently is we organized and conducted a few small groups of qualitative research.

And I know that research can be time-consuming. That can be its own project as well. But we approached it and took probably just two hours to develop questions and then to meet with interns, students, our new hires, and just ask them about our marketing materials and our messaging and see what's landing with them, what's not, what we want to be received in a certain way, and if they're

receiving it in the way that we've intended. And just really paring down maybe all of the things that we're doing and focusing on what is most impactful to them and what they're going to notice more. And that's been a great way for us to look at all of the things and know what we should be focusing on so that we can feel like we're doing what we need to be doing and doing it well.

Jean: Right. So, your focus is very specialized at Johnson Lambert, if I'm understanding this correctly, right? Because I don't believe you're on the new business development end, you're more internal communications, recruiting, internal employees, that sort of thing.

Lily: Yes. Yeah, that's correct. I do work a little bit on our website, but mainly on our DEI culture pages and students pages. So, still very much in that recruiting realm. And then, yes, a lot of the internal communications, a lot of our employee experience initiatives, of course, newsletters, the things that you mentioned in your intro, and then messaging to candidates.

Jean: I think this is an excellent example of using data that you're collecting to really target in on the types of employees you want and making sure that you're communicating the story about Johnson Lambert in an interesting way that would draw interest from your candidates.

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Lily: Yeah, absolutely. And definitely, some of the things that our interns told us was eye-opening and maybe the data that we were seeing was telling us one thing but having that qualitative conversation and really understanding the human perspective of it just opened so many more doors for us. And like you said, looking at the data is really important, and understanding the impact that you're having on your audience is the only way that you can be an effective marketer.

Jean: Right. So, I'm going to jump around here a little bit, Lily, with our questioning, because I think the numbers, the results that you've achieved, you and your team... So, it's my understanding that this social media strategy on TikTok and your targeted LinkedIn advertising resulted in reaching more than 723,000 users on TikTok with engagements from more than 22,800 people. That is mind-boggling to me. Can you share just a little bit about how that worked?

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Lily: Sure. TikTok, it really is a funny story because me and one of our marketing managers, we just love social media, and we love TikTok. It started as a passion project for us of how can we get our firm's personality out there? How can we share this different side of us that... Because accounting firms, they get the bad rap of they're boring. It's not the most glamorous career. But we know that we have really great people, and we want to be able to showcase them. So, it did start as a passion project for us. And a lot of the content we were creating was just general to the workforce in general. And once we started getting those great engagements, we were able to make it more accounting-specific and really try to target that specific audience. And that was when our numbers started to continue to climb.

But yeah, the main idea behind it was showing that our firm is a great place to work with a lot of fun people who are just like you, just like the students that we're trying to recruit. And we've had students tell us that they saw us on TikTok and that it wasn't because we told them to go look at their page. It was because we came up in their recommended feed. And that's like the best compliment I can get from a student is they found our TikTok and they loved it. But yeah, that's the... Because students, they just want to know that they're going to land somewhere that they enjoy with people that they like working with. You know, they're not totally thinking about how stable the accounting career path is. And they want to find somewhere right out of college where they have people that are just like them. So, that was our goal with TikTok. And once we really started getting some traction, we were able to home in on that accounting niche of TikTok and that's where we've done really well.

Jean: Right. So, if people want to see your TikTok videos, do they just search for Johnson Lambert when they're on there?

Lily: They can search for JL Careers. That is our segment of recruiting social media, JL Careers. And we've got quite a bit of content out there and we're always trying to recruit people in the firm to help us create more content. But yep, JL Careers is how you can find it.

Jean: Okay. Let me just do a quick follow-up. So, your internal folks, do you continue to be interested in participating in the videos? Do you get any pushback? How does that work?

Lily: There are definitely some people who do not want to participate at all, but a lot of the feedback that we've gotten is very positive. People think it's really cool that we're showcasing this side of the firm and this type of personality. And yes, we do get people who want to be in the videos. We get a lot of people telling us their ideas, and that is also just as valuable for the marketing team to create the content. They're the accounting experts. They know what's going to land with their population. So, we value their insight a lot and we lean on them for their ideas. But yeah, overall, I would say it's been very positive feedback that we've gotten on TikTok.

Jean: Well, that's great for you overall, right? Because it's good to get that positive reinforcement. And when you start delivering numbers like you're delivering, that has to open eyes both internally and externally about the firm. I think it's terrific.

So, we're going to talk about some more of your accomplishments in a bit, but, let me ask you. You're the Rookie of the Year, right? You have less than two years' experience in accounting marketing, and work life overall. What skills, in particular personal skills, do you have that have contributed to your success?

“What is that missing puzzle piece? ... always approaching it knowing that there is a missing puzzle piece, and something can always be added to elevate everything.”

Lily: Well, thinking about this question is, it sometimes feels a little bit difficult to think about yourself and what contributes to your own success. But when I was thinking about this, I kept coming back to, and it's going to sound a little silly, but my love for jigsaw puzzles and just working on puzzles in general. I love to do all of the "New York Times" daily puzzles. And that's really how I approach a lot of my creative problems is if we're trying to do something new, we're trying to tweak a message, whatever it is, what is

that missing puzzle piece that I can bring in and make the picture more beautiful, if you will, you know? What is that missing puzzle piece? And just always approaching it knowing that there is a missing puzzle piece, and something can always be added to elevate everything. But I also think I bring a lot of positivity to my work, and I really love what I do, but I'm also a firm believer in that if you approach things with a positive attitude, you're more likely to have a positive outcome. And I carry that a lot with me because marketing can be really hard and it's not always rainbows and roses and, yeah, it can be really challenging. But approaching things with a positive attitude, I think, is a huge key to all of it.

Jean: I love that because a positive attitude in life, in general, is going to benefit us, right? So, not only the challenges we might have with our work, but we could confront challenges and other situations in life, and we have a choice, right? We could choose to look at that in a more positive way or in a more negative way. And then that's usually how it goes, right? So, we need to give ourselves a little boost. Love that.

So, I know that you're building your network, and Lily, I love the way that you joined AAM and just dove in and joined a committee and you just didn't waste any time because that's a great way to meet other AAM members, right? And build those friendships because you're meeting them on a regular basis and all of that. So, with the people that you've met and have come to know, what skills or factors do you think relate to marketers being successful? What characteristics do you see in others?

Lily: Well, I think the easy answer is creativity. And I've talked about that a lot, but I think a couple of really underrated skills are resiliency and the willingness to learn. And I think that comes with having the resiliency and the understanding to know that not everything that you work on, you spend so much time planning and putting out there is going to work. It's not always going to work. And you have to just be willing to let that roll right off your back and pivot to the next thing. You know, being prepared to pivot, the willingness to learn of what didn't go right, how can we improve this? And then also being able with the willingness to learn, looking at all of this AI and new technology that's coming down the pipeline that can be really intimidating and really difficult to understand. But not being afraid to dive in and take advantage of that opportunity. So, yeah, I think resiliency, like I said, being prepared to pivot and having that willingness to learn and try new things is key.

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Jean: Right. I say to a lot of people that the way we can market and promote firms, the basics of it, is the same. Since the early days when accounts were then allowed to promote their firms to today. So, it's been a few decades, which I know in the scheme of the world is this tiny little time period. But the ways and the tools we have to market and promote the firms are so different. So, the basics are the same of what we want to do, but there's so many more tools that we could utilize. And yeah, some things might not work out so great, and others you hit it out of the park. It's so interesting about how marketers are diving in and trying all of these new things, especially AI. I mean, I've read up on it just a little myself. That's something that I need to spend more time on. But I think from a marketing standpoint, it's going to allow us to do so many things, right?

Lily: It's pretty incredible, especially the digital content aspect of the AI videos. Of course, like the language model generators, those are evolving so quickly and they're becoming smarter and smarter, I swear, by the hour. So, those are obviously incredible tools, but I think the digital content and just probably the insights that we're going to start getting from AI. AI is probably going to be able to tell us how our social media posts are going to perform before we ever put them out there. And I can only imagine where we're going to go from here. But yeah, you're right, it's still the traditional methods, but the tools that we have at our disposal now are really pretty incredible.

Jean: Right. It is incredible. And it's not all thousands of dollars, right? There's a lot of these tools that, some of them are free and some are pretty inexpensive, so they don't have to be budget busters.

Lily: Yep. And having that willingness to try it out and learn from it. Why not? If it's not super expensive and it's an opportunity for you to elevate your marketing skills that much more, why would you not try it?

Jean: Right. Exactly. So, you sound like a busy woman, Lily, with your role at Johnson Lambert. Tell us about your top priority right now. What are you working on?

“... to be really critical of our overall brand landscape ... looking at everything from our recruiting marketing to our client marketing and how we can be more consistent externally, internally, through all of our different audiences.”

Lily: One of the things that we are doing is trying to be really critical of our overall brand landscape. And what I mean by that is looking at everything from our recruiting marketing to our client marketing and how we can be more consistent externally, internally, through all of our different audiences. Because, like all accounting firms with different industries, you have a lot of audiences. But how do you maintain that consistency and continue to be recognizable, elevate that level of trust that clients have in you but also communicate your personality? So, we're really trying to increase our brand consistency and looking at it through a critical lens of knowing that we do have weak spots and where we can elevate that and just overall. Because we got a lot of creative fuel for this actually from AAM Summit and a lot of the brand consistency talks that were being had there. So, we really took that to heart, and it was something that we had already been thinking about. But yeah, that is probably our main priority for this year.

Jean: Right. That's terrific, because I've seen and I'm delighted by the attention that CPA firm brands are getting and how internally, not only the marketers, but partners, are focusing more on a firm's brand. Because there were many, many years where we would use the term branding for a CPA firm and you could see their eyes just glaze over and wondering, "Is that something we really need? What difference does that make?" And we're learning that it is very important because if you've created or built your story you want to make sure that that is genuine, right? That it's authentic and interesting and truthful and consistent if I didn't say that already. Or when someone looks at something or hears something that they know that that's from your firm and not your competitor down the street, that it really is a differentiator.

Lily: Yeah, that's exactly what we talk about too, is if you took the Johnson Lambert logo off of that, would people know that it's Johnson Lambert? Would they know that it's your firm talking? And exactly

what you said, a lot of times, our non-marketing people, they don't always get that. Because it's not just about the look and feel of your website, it's about the voice that you're using when you're communicating in your proposals, which is one of the most key pieces that our CPA staff is focusing on, those proposals. So, it carries over to all of those things. And yeah, I think consistency and just helping everyone understand that this is what could make or break a sale and that trust that we're developing in our potential clients, it's really important.

“... you conducted individualized ads for 23 campuses ... and you gained more than 111,000 impressions from accounting students who attended the universities that the firm is targeting.”

Jean: Right. It absolutely is. So, before we started recording, we talked just a little bit about the recruiting work you're doing at Johnson Lambert. And again, the numbers are very impressive. And hopefully, these notes, I've got them correctly. So, in the fall of 2022, you conducted individualized ads for 23 campuses. Okay. Did everybody hear that? 23 campuses. And your work resulted, in your firm, you gained more than 111,000 impressions from accounting students, 111,000 impressions from accounting students who attended the universities that the firm is targeting. You received engagements from 1600 students at those schools, and your overall candidate pipeline saw an increase in applications of 12.7%. Very impressive, Lily. Tell us just a bit about how that worked.

Lily: A lot of those targeted ads are on LinkedIn and we really took a step back and looked at the capabilities of LinkedIn and how targeted we can get to this student group. Because I know if I see an ad on LinkedIn, I typically scroll right by it, but if it has my campus' logo on it, our school's logo, if it has the name of the exact event that we're attending, the things that I'm looking for. So, we really try to personalize these ads to the exact student that we're looking for. And I think that that's a big piece of the success that we've had is if it's just a general career fair that isn't telling the student much about who we are or what we can offer them, they're probably not going to click on it. So, making sure that we were just taking the time to really customize it to what that student is looking for. And knowing that we can put out 100 ads and if they're all just super generic, no one's really going to click on them. And we might get a lot of clicks, but we're not going to get those applications or really that return that we're looking for. So, we said we might not get as many clicks as we have in the past, we might not get as much traction on them, but the clicks that we do get are more likely to result in the student application. And we know once we get them in the door and we're talking to them we can really build a relationship with them. So, that was the background on that, is we wanted to really customize it to the student. And we know that we're up against a lot of really incredible accounting firms out there, so how can we make them feel like they are special to us?

“... if it's just a general career fair that isn't telling the student much about who we are or what we can offer them, they're probably not going to click on it.”

Jean: That's a great example of quality versus quantity.

Lily: Yep. And in the backend of LinkedIn, you can really tailor it to accounting students at XYZ school. And even when it's a role, if we're looking for full-time roles, you can have LinkedIn say that they need to have had an accounting internship already. Whatever it is that your specifications are. We really just

wanted this ad coming up for accounting students at the school that we're attending. And making sure that they know we're going to be there, going back to what I was saying before with the brand consistency making sure that we're recognizable. Because we know that the likelihood of them having heard of our firm before walking around a career fair is probably not super likely unless they have parents who work in our industries or other parents in the accounting world. They might not have ever heard of our firm. So, how do we hit that touch point before they ever meet us and build that brand recognition before the career fair?

Jean: Right. So, I know this has just been done recently, but are you seeing a difference in the types or caliber of people that are interested in interviewing with you?

Lily: I think so. Yeah. Our recruiting manager, she could definitely speak to this a lot more, but, from what I've heard, we've had so many great candidates and I think, just like you said, quality over quantity has been the key piece for us. We have a small recruiting team as well. They can't do thousands of interviews to find the perfect candidate. So, yes, to answer your question, I think we've definitely seen just a higher caliber of candidate and also the type of candidate that would fit in perfectly at our firm.

Jean: Right. That's terrific. Okay, so two more questions. What is the best piece of advice you have for other accounting marketers?

Lily: So, I have two pieces of advice. One is for accounting marketers who are maybe starting out in their career, and that is, work on finding the balance between asking a lot of questions, but also being willing to lean into the knowledge that you have and be a contributor to the conversation. Because it can be really hard. And that's something I'm still working on early in my career is knowing that there will always be more for me to learn but trusting in what I do know and being willing to contribute to the conversation, especially when the conversation feels like it's bigger than you, because there will be a lot of those. And so, I think just finding that balance and working to find that balance. It can be hard, but once you get the feel for trusting yourself but also having that willingness to learn, like I mentioned, I think that is a big piece of advice I would give to the generation coming in.

“... knowing that there will always be more for me to learn but trusting in what I do know and being willing to contribute to the conversation, especially when the conversation feels like it's bigger than you ...”

To more seasoned marketers, I would say, don't be afraid to mix it up. You may do something 100 times and it may work all 100 times, but if it doesn't work that 101st time, you got to be willing to mix it up and try something new. Because you can always go back to what you've done in the past and what's worked. But also, I've found out that a lot of times we do stuff a certain way because it has worked, not because there's really any deep science to it. So, not being afraid to mix it up and try new things and just see the results that you get. Because it may be like the TikTok where we were really going out of our comfort zone trying something new, but it really paid off and now it's something that we have strategy conversations about. So, don't be afraid to try something new.

Jean: Right. Yeah, that's a lesson for everybody. That's a good reminder, Lily. Thank you for that. Because I think sometimes we might get stuck in the "We've always done it this way," attitude, and things just get

repeated just the same way as always, just because that's how it was done, instead of taking a look back and thinking, "You know, what could we change? How could we mix this up a little bit or improve it in some way?" Great advice. So, then tell us what is your best piece of advice for managing partners?

“... listen to what the people at your firm are saying. Ask them for feedback, listen to them, because that's how you're going to be a more informed leader.”

Lily: I think looking at this through my internal communications lens, the best piece of advice I can give is to listen to what the people at your firm are saying. Ask them for feedback, listen to them, because that's how you're going to be a more informed leader. And I know a lot of firms, they probably do poll surveys, different check-ins throughout the year with their firm where they ask for that feedback. But another way that we do it is we have a day of listening. And this is where all of our leaders come... The whole firm is invited. It's optional but strongly encouraged. And all of our leaders show up and they just listen. And this started as a DEI initiative for us, just talking about current events, what's going on in the world, especially with that DEI lens on it. But it's evolved into this "How can we improve the firm as a whole?" And our managing partner, he is a key piece of this, and he really takes it very seriously, gathers that feedback, and not only does he just take it in, but he develops a plan and lets the firm know how we're moving forward based off of this day of listening that we had. And I know our leaders, they also look at the suggestions that were made the issues that were brought up and how do we maybe apply that to our strategic plan and those priorities that we focus on every year.

So, it's become a big part of what we do as a firm every year. And I think as we continue to do it, people are just going to be more and more comfortable with voicing their opinions. And it sounds scary to just have an open forum for people to say whatever they want, but you also learn that people really do love their job and they love what they're doing. And the suggestions that they're making are maybe to just improve their team chemistry and stuff like that. But I think listening to what your people are saying, like I said, is just going to make you more informed and it's going to make you a better communicator back to the firm and a better leader.

Jean: I think that is a great summary for our Capstone Conversation this morning. We've been talking with Lily Morris, Communications Specialist at Johnson Lambert, who was named the Association for Accounting Marketing 2023 Rookie of the Year. Lily, congratulations again. Thank you for your time today.

Lily: Thank you so much.

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