

A Capstone Conversation with Becca Johns



Director of Practice Growth
Rea & Associates



CAPSTONE MARKETING

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Hello everyone. This is [Jean Caragher](#), President of [Capstone Marketing](#). I am excited to be talking today with [Becca Johns](#), 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. Becca is the director of practice growth for [Rea & Associates](#) with 13 offices in Ohio and one office each in North Carolina and Florida. Becca has been a member of AAM since 2005, the year she joined Rea & Associates as a marketing coordinator. I need to ask you a little bit extra about that, Becca. Becca has held various roles within AAM over the years, including as AAM President, and she has also chaired multiple committees. Becca, congratulations on being inducted into the AAM Hall of Fame. It's well deserved.

Becca: Thank you, Jean. I'm still so honored and still a little bit of disbelief that they chose me, but I'm certainly thrilled with the recognition.

Jean: Well, now you knew this recognition was coming. Tell me what you were thinking or feeling as your nomination was being read.

Becca: At the AAM ceremony, I kind of had to leave my body a little bit because, Carrie Steffen, I know her very well. My firm's been working with her for a couple of years. So she was the previous winner. So she kind of announced this year's winner. And she was saying such kind things for me that I just kind of had to stop listening to what she was saying because I was afraid I was going to cry. So I had to leave my body for a minute and just remember where I was and that I need to get through this. But I mean, it was so nice to feel the support of everyone in the room and to feel Carrie's support and to be receiving that recognition alongside Sarah Dobek was just was so great and something I'll never forget.

Jean: Right. I think because we've been doing the Hall of Fame for many years at this point, and I believe the caliber of people who are inducted into this Hall of Fame just gets stronger and stronger all the time. I think part of that is because of our industry becoming more advanced and perhaps more sophisticated over these decades, but also the ability of what marketing professionals accounting are able to do and the tools they have to do it.

Becca: Yeah, yeah, I've definitely seen that over the past 19 years, that I feel like the profession is elevating for sure. When I think about the types of things that I was doing when I first started, what other firms were doing it was like planning community events, making flyers, we're really truly strategic partners for our firm now. And I think AAM's played a huge part in making that

change. And I think the relationships that we're building with each other are helping too, because we're able to collaborate and learn what other firms are doing and apply those things in our firms. And, we're all just helping each other and helping our firms. It's really cool.

Jean: Right. Exactly. Because AAM has always been a very collaborative sharing type of organization. And I think for the most part, members have been very generous in what they're willing to share with other members. And that's unique, because not every organization is like that.

Becca: Yeah, I definitely agree. Yeah. Again, I have a pretty big network in AAM over the years and I can't think of a time when I had something I needed help with and there wasn't someone that was willing to help me. There's always someone that's been through that or can at least help talk you through it.

Jean: Right. Absolutely. Okay. So we've talked about this 19 years that you've been with Rea, right? Folks, her first job out of college, 2005, enters the accounting marketing world. Tell us what you think is the greatest challenge in marketing accounting firms.

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Becca: I think one of the greatest challenges, at least in a firm like mine, is how complex the firm is. Between all of our different industry practices and service practice areas, it feels like I'm marketing like 15 different companies sometimes where the different audiences, the way you market to a dentist is completely different than how you market to a manufacturer. We have to think about those buyers and think about the services that we're offering to those buyers and what pain they're feeling that we can help solve. And, my firm, at least, is constantly changing. And it's a lot to keep up with. There isn't a right or wrong. There's a lot of gray area. And to me, that's exciting and it's challenging. It's part of the reason why I've been in this role and at this firm for so long. But I think that's a big challenge that the profession wasn't changing for a long time, and now I feel like it is changing and we need to stay at the forefront of that.

Jean: Right. And you've also had the opportunity to build a team around you, which not every marketer gets to do. There's some firms with leadership that either don't understand or don't recognize the need for more staffing related to marketing. So I think that's another big difference that you've been able to implement where you are.

Becca: Yeah. I have such a respect for the solo marketers because that requires like a level of grit and scrappiness. But I don't know if I'm tough enough for that. I have such an incredible team and it's really nice to have that support and that collaboration to be able to do the things that we want to do. It would be so hard to be on your own and have to think about like really

prioritizing your time in a completely different way than a team like mine of eight people we're just able to do a lot more. And so hats off to all those solo marketers out there.

Jean: Right. Yeah, because you're right. And I think the word prioritization that you used is key there because with everybody coming at you it's a must. Otherwise, you'd feel as if you weren't getting anything done and you'd always be very busy. But, what is it that you're finishing? So tell me what you feel is the biggest opportunity you see for accounting marketers. We've talked about the industry changing and the vast amount of marketing tools that we have at our fingertips. What do you think the biggest opportunity is?

Becca: Obviously there's a big opportunity with data and technology and AI, making sure that you're using it and understanding it, that you're making the most of all the data that you have at your fingertips for your firm. I think another opportunity though is really owning it. And, especially for those solo marketers or even for people like me with a bigger team, I've really had to start kind of reminding myself that while the partners at my firm are my clients, the firm is my client, too. And sometimes doing what's best for the firm might mean I have to say no to a partner for a request. It's really not the best use of my team's time.

I guess I would say that's a big opportunity for accounting marketers. It's really elevate yourself and be a little bit more selective about the work that you take on and don't just be an order taker. That's kind of how I started in the firm. It was just like, "Yes, sir, yes, ma'am. If you need that, I will get that to you." And, now it's a lot more of like, "Well, what do you need that for? How are you going to see that be used?" And really thinking about how you can be strategic and how you can help the firm grow and truly being a growth partner for your firm.

And honestly, I think the partners, at least in my situation, I feel like they respected me more when I would have those difficult conversations with them and say, "I'm a resource for this firm. I'm trying to protect the firm's resources, and this is not the best use of my team's time." They're owners of the company and they appreciate that I'm being...I mean, maybe they are a little offended or a little hurt feelings. But I think at the end of the day, they appreciate that I'm being careful with their resources.

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Jean: Right. So, tell us how you made that pivot, if you will, or that change from being the order taker to being more strategic. Was that a decision that was made with time or were you kind of analyzing how you operated within the firm and decided that's something you needed to do or a combination? Give us a little bit.

Becca: It kind of started slow and just looking at how my firm was evolving and how what the firm needed from my team was evolving. So, I kind of started slow. But again, there were those partners that you're like, "Well, that's kind of the key person. I don't want to upset that one." But then late 2021, my team went from six people to two in just a period of a few months. And so that's when it became really real of like, "We only have two people now."

"Okay, this is a really good chance to see what is the most important things that we're doing, what is not moving the needle and we're just going to get rid of those, or we're not taking on new requests that don't have the potential that some of the other things that we do."

And I intentionally took my time rebuilding the team for a few different reasons. But that was when it really was clear to me of like, "Okay, this is a really good chance to see what is the most important things that we're doing, what is not moving the needle and we're just going to get rid of those, or we're not taking on new requests that don't have the potential that some of the other things that we do." It was kind of a little bit by choice at first and then kind of by force. But, I'm glad that happened because that's something that has stuck with me and it's something you need to continue doing. I kind of thought, "Oh, I did that once, we got rid of all the stuff that's not strategic and not valuable and not important. So check that off. We're good." And you really have to keep doing it. And something that might have made the cut initially, we realized, "Okay, that's past its useful life. We need to say goodbye to that initiative and move on to something else."

Jean: Right. Yeah. You're making a really important point there, especially for the solo marketers, because that's where the burnout comes in, right? Because if you just feel like you're spinning around that wheel and you're not getting the respect of the leadership that's what causes people to leave the profession or not to want to stay in professional services. But at the same time, you have to have your own guts to do that.

Becca: Yeah. And because the partners won't always tell you when they see something that they don't think is valuable, that they don't understand why the marketing team is doing that, they don't always tell you that even if you ask. Like, "Is there anything that you were doing that you don't think is adding value?" They are not always honest with that. And I kind of thought like, "Oh, they would tell me if they didn't agree with this direction," but they don't. So, you have to be that voice for yourself and you have to take a critical look at what you're doing. And I would say, especially for those solo marketers, because they don't have...they don't always have someone there to bounce that off of and say like, "I don't really like doing this anymore. Do you like doing this? Would you think we're getting anything out of this?" You really have to be kind of the whole team for yourself.

Jean: Right. Yeah. Agreed. Now you've mentioned the big network that you've built within AAM and I'm sure within other associations that your firm and you are a part of. What factors or skills have you noticed enable accounting marketers to be successful?

Becca: If we take the marketing, obviously being a good marketer, let's just say that's doomed. I think really good communication is important and that's two ways, communicating to your stakeholders about what you're doing, but also learning from them about where their clients are coming from, what pain points their clients have, and really just being open to shifting your strategy and listening to what the marketplace needs, identifying those opportunities. You kind of have to be a little bit fearless. We know as marketers that not everything is going to bring in a lead. Sometimes it does and we don't even know that it did. You can't always tie that attribution back. So you have to be okay to try something and know that it might not work, but then at least and you can learn from that. So I guess that that would be my three or four things I would say would be successful.

Jean: Okay. So then tell us personally, what skills do you believe you have that's made you successful?

Becca: My team and I did the StrengthsFinder exercise a few months ago, we all took the quiz, and one of my top strengths, and I've taken that before, is empathy. And I think that really helps me in a couple of ways. I think the empathy piece helps with, as I'm leading the team and really understanding where people are coming from. But I also think from the marketing standpoint, I just really enjoy the challenge of thinking through like, what's the meaning behind? When someone asks you something. Well, why are they asking that? And where's their head at right now why they're having this conversation with me, which can help you with prospecting?

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There was a partner that we used to have, he's retired now, but whenever he had a proposal, he and I just loved talking through like the strategy of it, and like, "Okay, they said this in the RFP. Why do you think they need that information?" And so we would kind of just noodle back and forth. And I just think that is one of my strengths and really getting inside people's heads and trying to uncover how I can best help them or how we can identify how the firm can solve their problems or be a solution for them in their business.

Jean: Right. Or how you can differentiate your firm because as we both know, using the proposal as an example, not every firm spends a whole lot of time creating those proposals. There's a lot of copying and pasting and changing the prospect name and updating the fee. So I

think you gave an example of that's a tangible way that you can track that effort into wins and losses, and we know how the partners love to see numbers and stats behind things.

Becca: Yeah. Yeah. It's always fun to come up with a solution or a proposed service offering, especially in a proposal situation that feels like this might be a little bit new, that maybe they're not seeing this in the other proposals they're getting, but it really shows that we were listening to their pain points and what their needs are. And yeah, when you get those engagement letter signs, it's like, "Yeah, we got that one," that feels good.

Jean: Absolutely. What is your top priority initiative right now?

Becca: So, my firm is rebranding. So that's a big one. We are doing a small name change, new logo, new color palette fonts, the whole nine yards. We're also changing...

Jean: The brighter way is going?

Becca: It has an expiration date. Early December, we're going to be launching a new brand. So, a new website alongside of that. And we're also changing our domain and kind of our position in the marketplace. So our domain right now is reacpa.com and we're taking the CPA out and positioning ourselves more as advisors still offering accounting services, but we look at our strategic plan and where we see our growth coming from. It's from a lot of those advisory services. So we just felt like, "Well, we're rebranding. This is a good time to challenge the mindset of being a CPA firm and positioning ourselves as a little bit more than that." So really interested to see how that goes. We're in the thick of it right now.

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Jean: Having helped firms in the branding area many times, I can empathize with you because it is a huge project with lots and lots of details and things that you need to update and create. It's a big deal. It delights me when firms and firm leadership understands how important a firm's brand is to the existence of a firm, because it was not always like that slap a logo up and we don't need a vision or anything like that. Let's just get going and just do what we do best. So, kudos for that because obviously, the firm has been through this before, so they understand the importance.

Becca: Yep. Yeah. It's a big investment. And I wasn't sure how the change of marketplace position away from accounting firm was going to go over. I had a bunch of stats pulled into the last time we rebranded. I think it was like 60% of our workforce in the firm was a CPA and now it's like 25% or 30%. So, are we still a CPA firm? But a few of the key leaders were on...like the first time I mentioned it, they were on board with it. So I just, "Okay, I'm not getting an objection, so we're doing it." And, I think people are really excited about it. And our clients will

understand that we're not stopping the traditional accounting audit tax services, but that we're also offering IT consulting and wealth management and all the things that are not traditional services that are really propelling our growth.

Jean: Yeah. So I don't know that it would be a challenge in your case, but taking that positioning, there's the evidence or the proof to the pudding, so to speak, that your people are advisors in addition to being accountants. I'm excited to see the rollout of that, Becca.

Becca: Yeah, me too.

Jean: So tell me, what is your best piece of advice for accounting marketers?

Becca: I would say, and I've got a lot of people say this, but I can't understate the importance of building your network. And I think that goes through within AAM, obviously, like huge, huge benefits there. And I wouldn't still be here at my firm if it weren't for AAM for sure. But I think it's also really important to build those relationships inside your firm too. And I love it when a partner calls me with a question or just wants to get my advice on something because to me that shows that, the time I've spent building those relationships, that they're mutually beneficial that a partner says, "Oh, I wonder if that can help me with this, or I wonder if that can know someone that can find this resource for me."

So I think it's important to focus on your own personal development and building those relationships with peers in the profession, but then don't lose sight of the people that are inside your firm. I know sometimes partners can be intimidating, but really my managing partner calls it getting closer to the money, having a really good understanding of how the firm makes money, where our clients come from, what they need from us, from a marketing practice growth standpoint, I think that's really critical.

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Jean: I love that, getting closer to the money. That's a great saying.

Becca: I think a lot of time marketing is kind of like, "Oh, we'll call you when we need you," and you're kind of off to the side. But you really should be ingrained and like truly a partner in the business.

Jean: Right. And I know that AAM many times has provided programming about educating marketers about how a firm does make money, how does the firm run, what kind of stats are they tracking, what makes a firm profitable, and all of those things. So, yeah. And I think that

also goes towards a marketer being able to advance in their firm or make a step either to a bigger firm or a higher level role. You do need to know how that happens. Otherwise, I don't know how you could operate within your firm if you didn't have that knowledge.

Becca: Right. Yeah. And oftentimes the career path isn't as defined for marketing, even at a firm of my size, we have a formalized coaching program and a formalized performance management program, but it's really built for the client-facing billable people. So you kind of have to take ownership of your own development yourself. My boss was the CEO and I've reported to him for two or three years, but this is the first time he's ever had marketing reporting to him. And he's like, "I don't know what I should be expecting of you." Like when he grew up in the firm, he was getting taken to client meetings. We call them ride-alongs. He was getting visibility into all these conversations that just because we're in a different side of business that we haven't seen. And so it's been really eye-opening for both of us to kind of see this is a new thing for him. It's my third or fourth boss since I've been at the firm. So it's not that new to me, but...

Jean: Right. So let's just tag onto that. What would be your best piece of advice for a managing partner?

Becca: Yeah. I think it's really important for a managing partner to have a foundational understanding of marketing, kind of like how the marketers should understand how the firm operates. I feel like managing partners, obviously, they should trust their marketing department, but they need to have a foundational understanding of what these things are that we're talking about. It's kind of frustrating when you have to explain every time, "Well, this is what an open rate is. This is what a bounce rate is. This is why we look at those things." But then also empower them and have clear expectations for your marketing department.

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I know that my CEO has some CEO peer groups that he's in, but if they're not sure about what they should be expecting from their marketing department, they should really talk to... my JavaScript hasn't been updated in years. And it's a little frustrating because I feel like what's expected of me, I kind of know, but I don't really know what I'm being measured against. And I would bet that a lot of marketers are feeling that too, just because they're not used to managing a marketing department or having a marketing department report up to them all the time. So I think the managing partner should educate themselves a little bit about marketing and how they can work together and really involve them in the strategic decisions that the company is making to truly get the full value out of that function.

Jean: Right. And I think that's another great opportunity for marketers to be proactive in making that happen.

Becca: Sure. Sure. Sure. Yeah. Yeah.

Jean: There's not a partner that's going to jump up and say, "I'm going to take care of you. And I'm going to make sure that everything goes really well for you in this firm." The marketer themselves has to ask those questions. So, if there is any misconception about expectations or what your role is or what the most important things are that you could be doing for the firm and within the firm, it's my belief that it's up to the marketer, make sure that they have those answers. And that's particularly challenging when firms hire their first marketing director or maybe their second marketing director, and they're really not clear on what they need that person to do from the beginning. And we both know what happens then.

Becca: Yeah. Yeah, for sure.

Jean: Right. Well, it seems, Becca, you've done a lot of things right at Rea for your 19 years and for the rebranding. And we thank you for your involvement in AAM. Again, we've been speaking with Becca Johns, director of practice growth at Rea & Associates, who was recently inducted into the Association for Accounting Marketing Hall of Fame. Becca, congratulations again.

Becca: Thank you, Jean. Thanks for having me.

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