

# A Capstone Conversation with Glen Carmichael



Digital Marketing Coordinator  
YHB CPAs and Consultants



CAPSTONE MARKETING

## Capstone Conversation with Glen Carmichael Director of Practice Growth, YHB CPAs and Consultants



Hello, this is [Jean Caragher](#), President of [Capstone Marketing](#). I am excited to be talking today with [Glen Carmichael](#), Digital Marketing Coordinator at [YHB CPAs and Consultants](#), who is the [Association for Accounting Marketing, 2024 Rookie of the Year](#). Here are a few of Glen's accomplishments. Expanding the firm's newsletter distribution to over 55,000 recipients, boosting event attendance to 3,200, managing over 23 educational webinars, and increasing the firm's blog readership to over 64,000 users annually. Glen's initiatives have led to an incredible 30% year-over-year increase in lead generation. Congratulations, Glen, on being named AAM's Rookie of the Year. Well done.

**Glen:** Thank you so much. What an honor.

**Jean:** I know we've got some questions planned, but before we do that, just tell me how you felt, when you heard your name, that you had won this honor.

**Glen:** Yes, to be completely honest, it was mostly panic that they said my name, but also a lot of excitement. I was surprised. I think this will be a great opportunity for people to see maybe my public speaking skills, because when I went up there, I think I just yelled thank you as loud as I could, nowhere close to the microphone, just into the crowd. So, surprised to say the least.

**Jean:** Well, given even just what I've just read and also about what you've contributed to the firm, every year I'm just more and more impressed with the award winners for what you're able to do within your firms, which we all know, accounting firms can be a challenge. So, now Glen has been with her firm for two years, or at this point, probably a little bit over two years. So, Glen, in that time, what have you found to be the greatest challenge in marketing CPA firms or being part of a marketing department for CPA firms?

**Glen:** I think a challenge that maybe a lot of other firms face as well is just thought leadership. We find that team members are maybe more likely to kind of, get on the marketing board, maybe on, like, the BD side and really bringing in the prospects. But for me as a digital marketing professional, where I'm always looking for more people to create content, and just kind of start that client relationship before the BD phase of everything.

**Jean:** What's been your best tactic to get the folks to help you produce that content?

**Glen:** I have been extremely lucky. And I think the best way to do it, is just to start at one. Our tax director has been incredible. He does quarterly tax webinars and is always writing. And I

think him doing it quarterly, kind of got other people talking in the industry, like, "Why doesn't our industry team do a quarterly webinar?" And it's kind of slowly rolled into more teams doing quarterly webinars just because you got to start at one.

**Jean:** Wonderful. Right. You gain the relationship with that person and then other people see it. Yeah, that's a great example, right? Well, that is wonderful because we both know the importance of creating that content and being able to update websites and blogs and videos and all the rest of it. Tell me, given your experience, which one of your personal skills do you think contributes most to your personal success?

**Glen:** So, maybe it's cliché, but I'm really passionate. I really love what I do and I care about everything I do. So, being passionate at work every day, I'm able to grow and continue learning. And I just simply love what I do.

**Jean:** And that's a great position to be in, right? Because we need to be doing something. So, you're in the position that you're really doing something that you love.

**Glen:** Definitely.

**Jean:** Wonderful. Now, I know you're building your network and obviously, you're an Association for Accounting Marketing member, and I know you're on a committee, so you've gotten yourself involved. When you consider those people in your network, what skills do you see that they have that help make them successful?

**Glen:** I think maybe the biggest skill you have to have in accounting marketing or just marketing in general is to adapt. For me on the digital side, we're seeing technology change every day with AI and even just social media platforms changing. I mean, Twitter changed to X and Instagram introduced Threads, just in this last year. So, I think successful marketers kind of have to expect the unexpected and be willing to change with whatever is thrown at them.

**“I think successful marketers kind of have to expect the unexpected and be willing to change with whatever is thrown at them.”**

**Jean:** Right. And that is so interesting for me because I've been in this profession a long time. And I believe that the marketing basics are still the same, of what we're trying to accomplish. But these days, we have so many more tools at our disposal to be able to do that.

**Glen:** Definitely. No, and there's new tools every day. I feel like we're constantly doing demos and researching new things, just to help in a very small part of the marketing process. There's something for everything.

**Jean:** So, how do you keep up with that? All these changes are coming out so fast. I mean, do you have different blogs you follow or people, or how do you do it?

**Glen:** It's really kind of, you got to go out there and just see what... AAM is a really good resource to kind of lean on other people and see what is your firm doing for this? Do you have something in place? And just kind of getting out there, just to see what everybody else is doing. Is this something we want to follow through with?

**Jean:** Right. I could appreciate that it's a lot, especially with the pace that the information and technology is changing. Well, maybe this is not the right question. I was going to ask you, like, explain a typical day for you, but then I'm thinking, "Is there a typical day?"

**Glen:** No, I don't have it but, yeah.

**Jean:** How do you spend most of your time then when you're with your workload?

**Glen:** I tend to do things on, like, a more monthly basis. So, social media emails, I try to get them planned in a couple of days and just get them out there and scheduled to make sure all of that's good for the month. I'm also transitioning more into, like, an operations role. I often find myself being kind of, like, the IT marketing person. I'm more focused in making sure that the kind of techier things are done. But, I would say a typical month, try to get everything as done as quickly as you can, and then just kind of run tech support as much as I can. Because that you get a million emails today with the most crazy requests. If we can get kind of my things done, then I'm available the most for everything else that needs to be done in the world.

**Jean:** Right. Do you enjoy that part of it?

**Glen:** I think that's why I'm excited to move more into operations. Because I really like troubleshooting, I like learning, I like trying new things, testing, finding solutions. I'm the kind of person who really loves checking off something on a to-do list. And so, yes, the more things like that, then that's what makes me happy.

**Jean:** Yep. Years and years ago, I heard this speaker and part of what he was talking about was goal setting. And he talked about his list, and oh, gosh, I always have a list. And I really enjoy crossing through or deleting it when it's done. And this guy said, "Yep. And I'm really so serious about it that if I finish something, and I go to cross it off my list, and it wasn't there, I add it to the list, and then I remove it." And I do the same thing because it's so satisfying.

**Glen:** A hundred percent. It makes you feel like you did something in the day. If you can cross it off at the end of the day, just keep adding them, and then just cross them off.

**Jean:** I agree completely. Oh, gosh, there's something just very satisfying about that. Glen, tell us about what your top priority initiative is right now.

**Glen:** So, like I said, I'm kind of moving into this more operations role for our team. The top priority right now is we're hiring another member into our team, specifically for digital

marketing to kind of help out with that workload. This is the first time someone's working directly under me, which is exciting. I'm just really excited to learn how to lead and be a good mentor. And I'm just excited to continue to watch our team grow because it has and it continues to pretty quickly as the firm grows as well.

**Jean:** Right. That's exciting. And it seems that YHB is willing to make these hires and expand that marketing or digital team.

**Glen:** We are extremely lucky to be able to continue to add more people.

**Jean:** I'm sure in your networking you've met a lot of marketers that are teams of one. So, it's so nice when you have that other person or people that...

**Glen:** I don't know how they do it. All of the hats off to them that it's, I could never, right?

**Jean:** Right. These next couple of questions might be a little more difficult because you're at the beginning of your career and you've been in the accounting marketing profession for just a few years. But as you see, how you operate and as you're talking to people in your network and your association about what they do and how they do things, do you have a piece of advice that you could share with other accounting marketers?

**Glen:** I mean, I think you said it, is to have those people, find your people. AAM is a really great resource for that. I have found an endless amount of people that I can lean on, I can ask a million questions to, and I do. And most importantly, I make friends. I'm passionate about what I do. And if they have the same passions, and it makes a really incredible friendship even across the United States or Canada, so...

**Jean:** Right. And that's going to continue for you because I have friends from AAM that we've been friends for decades and it's a really important part of my life. I'm happy to hear that you're having the same experiences.

**Glen:** Definitely.

**Jean:** Okay. So, then would you have a piece of advice for CPA firm managing partners?

**“ ... leadership sets the tone for the entire organization. And if they're seeing value and marketing and BD, then others will too. And it gives us a better chance.”**

**Glen:** I don't know if I'm the right person to give any advice to managing partners at all. But if I were to say anything, lead by example and give marketing a seat at the table. We often find that leadership sets the tone for the entire organization. And if they're seeing value and marketing and BD, then others will too. And it gives us a better chance. Because like you said, we're kind of

the ones who know exactly who's coming through the door. So, it helps the firm grow in the end. If they're leading and telling people that.

**Jean:** Absolutely. In your role, are you involved at all in recruiting?

**Glen:** No, I do a couple of social media campaigns and recruiting. But once it's out to the strangers, I always say, I talk to strangers, not real people. So, once it's out to the strangers, then my piece is over.

**Jean:** Right. Okay. Now, that's interesting because the staffing is a challenge. And I'm actually surprised about the number of marketers who aren't teaming up with HR related to recruiting. And I could see how specialized your role is, but then you're using your skill digitally to help them with those campaigns and everything to attract folks. That's all.

**Glen:** I found it pretty successful. We did this a couple of years ago, but we quoted an influencers group, and we selected a few team members, and we called them influencers for two months. And they were sharing all of their recruitment posts on social media, liking, writing recruitment posts of their own. And I think it was incredibly successful and it was a wonderful way to kind of bridge that gap, like you said, between marketing and HR.

**“ ... we called them influencers for two months. And they were sharing all of their recruitment posts on social media, liking, writing recruitment posts of their own.”**

**Jean:** Right. Because there are so many... I'm actually, I'm happy to hear how focused your role is. I hope I'm interpreting that correctly. Because marketers can tend to have their fingers in a lot of pots. And there's really a need to prioritize what you're doing so that you're staying on course with those most important things. So, I think it sounds like you're in a really good spot there at YHB.

**Glen:** I think so. I'm very incredibly grateful and lucky to be here.

**Jean:** Wonderful. Well, I've been talking today with Glen Carmichael, Digital Marketing Coordinator at YHB CPAs and Consultants, the 2024 Association for Accounting Marketing Rookie of the Year. Glen, congratulations again.

**Glen:** Thank you so much.

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