

# How Do You Make An Accounting Firm Interesting?

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When you first read the title of this piece, you may have chuckled; almost certainly you would not be surprised if it's the first line of a joke. But it's not a joke at all. It's a serious marketing communications issue facing accountants and numerous other professional service businesses, including law firms, engineering firms, insurance brokerages, financial service providers and technologists. Firms in each of these professions can have real trouble distinguishing themselves in the marketplace.

In fact, you might have an “uninteresting” business that you need to make interesting if it is to grow. Evoke Strategies might just be the firm you need to call. We could tell you why at great length. But it would be more fun to tell you what we did for one client, a CPA firm.

## *Why Professional Service Businesses Are Not Interesting*

Before we get to the story of our CPA firm, let's look at some of the underlying circumstances that can conspire to make professional firms appear dull.

Why is the concept of making an accounting firm interesting so humorous? Simple:

*We already have a preconceived notion of who accountants are and what they are like. And that notion precludes them being interesting.*

Move past the perceived inherent dry reliability of accounting. Is there anything – aside from the arcana of the tax laws – you think you don't know about accountants? Probably not. This leads us to the second challenge of making an accounting firm interesting:

*We typically are not interested in what we think we already know.*

Now let's look at what accountants do. Most of us would say that they prepare our annual – or quarterly – tax returns. How interesting is that to us? Not very. Why? Because we do not perceive it as a high value service; we view it as a transaction, almost a commodity.

*Businesses that are based on transactions or commodities are not interesting unless the transaction goes wrong or the commodity is not available.*

Finally, let's look at a closely related – but still distinct – issue: image. The simplest way to do this is to close your eyes and think of accounting and accountants. What comes up for you? Most people would see calculators, money and stacks of paper with perhaps red and black pens and green eyeshades mixed in for a little color relief. Interesting? I don't think so and probably neither do you.

*If the visual images we conjure up when thinking of a business are not interesting to us, the business itself is unlikely to be interesting.*

We can replay these exercises with many other service professions. Although our perceptions change, they still tend to have four things in common:

- We already think we know what people in the profession are like.
- We already think we know everything we need to know about the profession itself.
- We perceive what the professionals do as transactional, providing a defined service for a specific, limited time.
- We have a hard time conjuring up images related to the profession that intrigue us – or make us feel anything good at all.

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In short, it's quite difficult to make many professions interesting. And if it's difficult to make the profession interesting, it's not going to be very easy to make the specific professional firm interesting.

*It's tough to distinguish one firm from another in the same profession.*

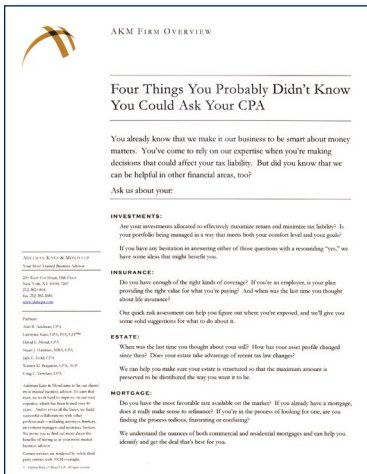
## *Distinguishing the “Undistinguishable”: The Story of One Manhattan CPA Firm*

Adelman Katz & Mond LLP (AKM) is like any number of small and mid-sized New York CPA firms. Its partners are smart, dedicated to their clients and meticulous about their work. And like its competitors, AKM is hungry for new business. So AKM's partners asked Evoke to help raise the firm's profile in the marketplace.

### **The First Step: Changing the Conversation**

While the overall branding plan and brochure were still in development, we started the process of changing the conversation about AKM and what it could do for its clients. Three elements were key to this initial stage:

1. **Tagline:** To start changing the conversation about what AKM actually does for its clients, we started by creating a tagline that is both powerful and true. The phrase “Your Most Trusted Business Advisor” now appears on most of AKM's market-facing communications.
2. **Service menu:** Most professional firms offer a much wider range of services than their clients realize. Sometimes even the professionals in the firm cannot enumerate the entire list of services. So the second thing we did for AKM was to get a firm grasp on the obvious by developing a comprehensive service menu, which we promptly mailed to all clients. This gets updated and redistributed annually. Needless to say, it goes well beyond the tax and audit services most people think of when they think of CPAs.
3. **Quirky questions:** After we listed everything, we wanted to get a little more specific. So I interviewed all the partners to find out areas where their clients regularly called on them for advice and direction – and where they felt they had made a positive difference. After identifying the top areas, Evoke created a short piece, “Four Things You Probably Didn't Know You Could Ask Your CPA.” This, too, was widely distributed.



A simple marketing piece that changes the conversation just by asking questions.

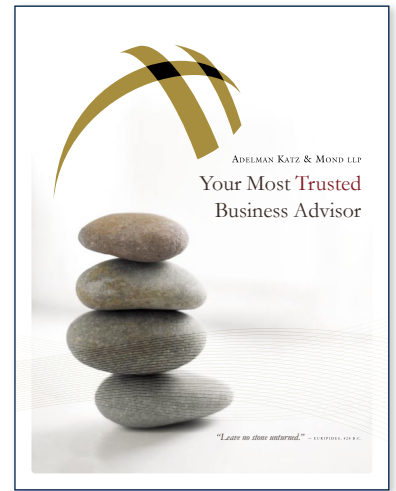
### **The Second Step: Shaping a New Image**

The brochure is the centerpiece of our strategy to change the way clients and prospects perceive AKM. It's not like any accounting firm brochure you've ever seen. Rather than talking about taxes and audit issues, we talk about financial well-being. The piece starts with the central question, “What value does your CPA bring to the table.” It's written in a warm, engaging style that invites readers to look far beyond their usual perception of accounting – and accountants – to what they could get by having a single “most trusted business advisor” and to what they lose by not having one. It also includes gentle humorous pokes at the traditional perception of the profession.

The image the brochure projects is at least as important – if not more important – than the story and language we created. The format is substantial and atypical for brochures of this type. The piece is larger than a typical brochure and printed on a high quality stock that is both heavy and smooth. It's the sort of piece people really want to hold. We also chose a format that draws readers inside. The imagery is critical as well. While the piece is graphically rich, it achieves this effect without copious use of stock photography. One stock photograph is used in three different places. Variations on AKM's energetic logomark punctuate the piece. Finally a pattern of subtle, soothing lines carry the reader through the piece. Note that the stock photograph we chose is not some typical business image, but a beautiful,

metaphoric stack of smooth stones. These echo the themes in the text and introduce a Zen-like calm into an area where most people feel significant anxiety.

I should note that we did this with the help of a truly creative visual team from MNovakDesign. While this was not the least expensive graphics firm we could hire, they were the firm best situated to deliver extraordinary results. Our printers at Symmetry Prints were also instrumental in getting the look and feel exactly right through dozens of ink draw-downs and press tests. When you're trying to break a mold, you cannot scrimp on graphics and production.



The brochure cover. Definitely not what you'd expect from a typical CPA firm.

### *The Third Step: Playing in the Marketplace*

The final thing we decided to do in this first stage of distinguishing AKM was to run a series of classified advertisements in *Crain's New York Business*. As with the brochure, we did not talk about familiar services. We asked a series of fun, provocative questions:

- Would you rather eat your spinach than call your CPA?
- Who crunches your numbers?
- Do you get better financial advice from Great Aunt Bertha than from your CPA?
- How happy are you when your CPA calls?
- Is it more fun to visit your dentist than to visit your CPA?
- Does your CPA spend weekends in a secure undisclosed location?
- Does your financial right hand know what your financial left hand is doing?

Clearly these ads hint at the possibility of a bigger role – with more value – of CPAs in people's lives. They also show CPAs having fun – and a sense of humor – things not usually associated with the profession.

Samples of *Crain's* ads in actual size. Humor is a valuable commodity — and an effective tool.



### *The Outcome: An Interesting Accounting Firm*

AKM is well on its way to securing more – and bigger – business. The firm's partners have a much sharper understanding of what they really do for clients. More importantly, they know how to frame it in a way that's intriguing, that raises the question in prospects' minds of whether they wouldn't be better off with AKM as their CPA firm. Current clients are beginning to generate positive buzz for the firm based on the material Evoke created. AKM is now that rarest of all business entities, an interesting accounting firm.



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