

Inovautus Consulting helps professional service firms develop growth plans, evaluate their marketing efforts, use social media, develop client retention programs and retain talent to grow their firms. Part of this commitment includes dedicating time and resources to speaking at the many events in today's dynamic accounting profession. Please take a look at our current speaking schedule: <http://inovautus.com/speaking>. We hope to meet you at one of these events soon.

If you are interested in having Sarah Johnson Dobek or another Inovautus Consulting team member speak at your conference, association meeting or firm retreat, please contact Jenni Thulin for more information at (888) 491-9330.

The Inovautus Consulting speaking topics menu is listed below.

## **2017 Speaking Topics**

### **Merger Communications & Planning**

Mergers are something many firms will explore at some point. The right communications can make or break the overall experience for both your firm and firm that is merging in. During this session, we will discuss the internal and external communications every firm should address during a merger or acquisition.

### **Overseeing Marketing – What's Next?**

Whether you are new to marketing or have been at it for a while, overseeing or spearheading marketing for your firm can be a huge undertaking. In this session, we'll cover the basics of what you need to know to successfully lead or oversee this for your firm, including:

- What to do first
- How partners measure results
- How to tap into low-hanging fruit for easy wins

### **The Growth Professionals Role in Client Transition**

CPA firms today face immense succession issues and many are struggling with how to deal with them. Once a firm has identified a successor, the real work starts and they begin with a client transition. As a growth professional, you can play an important role in helping your firm address client transition. In this session, we will introduce the elements growth professionals should be considering to support their firm through client transition, including communications surrounding the transition and internal client transfer among key relationship providers. Whether you have a managing partner retiring, a partner, or a key manager or principal, this session will address some of the most important elements the growth professional needs to understand and how to help support their firm through this.

Learning Objectives:

- Understand the impact of a transition in terms of time (aka billable hours) for the professionals so they understand the financial impact/availability from the CPA's perspective.
- Understand some of the emotional barriers/roadblocks that might be faced with the transition
- When, how and what to communicate about the transition
- Understand how to set realistic expectations for growth during a transition

**Steps to Specialization: How to Create an Industry or Service Practice Group**

Establishing an industry or service niche can be a great platform for helping your accounting firm differentiate itself in the marketplace. In some cases, specialization happens organically – a professional has deep technical knowledge in a particular service, or a firm already has a grouping of clients in a particular industry. But for most firms, building a specialized practice group requires a deliberate, disciplined approach. There are many factors to consider when building your practice group to ensure you get the proper growth ROI for your investment. In this session designed for both marketing and accounting professionals, we will discuss tips and best practices for:

- Identifying areas of specialization that will work for your firm
- Building your practice group team
- Developing the proper elements of a practice group plan
- Creating momentum toward reaching practice group goals

**What does it take to drive growth in your firm?**

Developing a culture of growth doesn't happen by chance. It is intentional and it takes teamwork. Marketing, sales and shareholders must work together. In this session, we will explore the shareholders role in building a growth culture and supporting marketing and sales. Whether you were just named the partner in charge of growth or this falls under many other duties, we will explore what it really takes to drive growth. You'll hear from Sarah Johnson Dobek as well as several real shareholders on

- Roles and responsibilities for growth inside a CPA firm
- Common challenges and how to overcome them
- Successful strategies for holding partners accountable for growth
- How best to support your marketing and sales professionals

**How to Build a Consulting Practice**

Join Sarah Johnson Dobek for a session on How to Build a Consulting Practice. CPA firms can't rely on compliance services alone to grow their firms. They must begin offering value added services clients really want. Consulting services will be a key driver for growth in most firms. In this session, we'll discuss

- What consulting services many firms are offering and exploring
- How to identify the right services to offer

- The difference between delivering consulting services vs compliance services
- Best practices for pricing and selling consulting services

### **Establishing virtual working opportunities in your CPA firm**

Flexible work environments are becoming a requirement in CPA firms. Nearly three quarters of the large and mid-size firms surveyed are providing work from home programs. In this session, we will discuss the benefits firms are seeing from a more flexible environment, performance measures being used and guidelines for setting up your work from home option in your firm.

### **CPA Firm Recruiting & Retention Strategies**

The recruitment and retention of talent is critical today. Recruiting the right talent and then retaining that talent requires a focused, proactive plan. In this session, we will discuss how to build a proactive approach to recruiting and retention in your firm and share what innovative firms are doing to recruit and retain staff. At the end of this session, attendees will understand

- What really attracts the right candidates
- Strategies and tactics for a more proactive marketing effort
- What really matters in retaining staff
- Unconventional approaches firms are employing to help retain staff

### **Key Considerations for Transitioning Retiring Partners**

Many CPA firms will have - or already have - partners retiring in the next five years. How do you successfully transition these relationships? This session will explore how to successfully transition a retiring partner out of the organization. We will share the key steps for how to successfully begin the transition. We will also show you how to evaluate the average age of your client base and determine your average attrition rate and the impact to your bottom line - and what this could mean for your growth rates.

- Look at analyzing your client base's average age
- Putting programs in place (marketing's side of the client transition)
- Looking at how to facilitate the process with
- Securing relationships
- Replacing revenue

### **Using Campaigns to Maximize Content Output**

Content marketing has created opportunities to create thought leaders, nurture relationships and enhance brand awareness for many firms. But how do you make sure you have the right content or enough to make the right impact? Attendees of this session will learn more about:

- Understanding what types of content your firm needs for successful marketing in the age of SEO, social media and short attention spans.

- Prioritizing content when working with limited budget and personnel resources.
- Leveraging content development from partner to staff.
- Promoting service and industry specialization by creating and nurturing thought leaders.
- Getting the most impact through an organized content campaign.

In this session, we'll discuss why marketers need to look beyond the one-off content approach to build comprehensive content campaigns.

### **How Marketers Can Contribute to Sales – Developing Your Firm's Sales Approach**

As more firms focus on top-line growth, marketers are often asked to get directly involved in sales. While it is natural for marketers to want to shy away from crossing the marketing/sales divide, one way marketers can make an impact is to help firms create the right sales approach. Attendees of this session will learn more about:

- Defining "Business Development" and "Growth" and gaining buy in from managers, principals and partners on their roles in driving both
- Creating a basic methodology for "delivering" business development
- Sifting through the clutter of various sales processes and vendors
- Measure and show success to gain more "converts"

In this session, we'll discuss how marketers can help to create the sales process without becoming sales people themselves.

### **What's Your ROI?**

Many firms are actively involved in marketing, but most aren't measuring it. Being able to see where you are doing well and where you could improve are keys to driving positive growth in your firm. We will show you how to measure some of the most common professional service marketing activities - like web, social media, sales, communications, client loyalty and more. We will also show you how to create a dashboard and how to interpret some of the data.

### **State of Social Media in the Accounting Profession**

Social media adoption among CPA firms is still fairly unsophisticated. While much has been discussed, many CPA firms still struggle to effectively implement social media. In this session, we will share our 2014 research on the state of the profession - as well as key opportunities where firms can improve.

- Review of key survey research
- Overview of the areas for improvement

### **The Marketer's Role in Partner Retirement Planning**

Many CPA firms will have - or already have - partners retiring in the next five years. How do you successfully transition these relationships? This session will explore how marketing and growth professionals can help with the transition of a partner. We will share the key steps for how to successfully begin the transition and bring staff along accordingly. We will also show you how to evaluate the average age of your client base and determine your average attrition rate and the impact to your bottom line - and what this could mean for your growth rates.

- Look at analyzing your client base's average age
- Putting programs in place (marketing's side of the client transition)
- Looking at how to facilitate the process with
- Securing relationships
- Replacing revenue

### **Content Marketing Panel**

Content marketing is at the top of every firm's marketing plan. Getting CPAs to write, managing your risk and coming up with a process that firms actually follow is easier said than done. Hear from three CPA firms and how they implemented process in their firms. Learn what works, what doesn't and the keys to getting adoption with your content development process.

- Panel of experts to discuss content marketing process/elevation in their respective firms
- (DHG, KSM, HEIN)
- Session is focused on the "how"

### **Taking Your Content Marketing to the Next Level**

Today, marketers are obsessed with content marketing—and understandably so. Content marketing has created opportunities to generate value and impact through engagement, education and nurturing. The upside is significant, but, so are the considerations. Attendees of this session will learn more about:

- Understanding what types of content your firm needs for successful marketing in the age of SEO, social media and short attention spans.
- Prioritizing content when working with limited budget and personnel resources.
- Promoting service and industry specialization, from web sites to thought leadership.
- Getting the most impact through an organized content campaign.

In this session, we'll discuss why marketers need to look beyond the one-off campaign approach to build a comprehensive content strategy.

### **The Digital Professional Services Firm**

Becoming Digital is critical for every professional services firm. Buyers today are going to social networks, blogs and the web to find information and resources to solve their problems. This session will cover the essentials that every firm should be doing to become more digitally visible. Topics covered will include what you should be doing with your website today, what social networks you should be considering, content generation best practices and search strategies.

### **Elevating Your Digital Presence (Basic)**

CPA Firms today need a digital presence to stay competitive. Social Media, E-Marketing, Video and Websites are all playing an important role in generating visibility and business. But, how do you know what you need and which platforms are right for you? In this session we will discuss the most important social networks CPA firms should be using, how to incorporate emarketing and what role websites play today.

### **Elevating Your Digital Presence (advanced)**

Many people are now using social media to build awareness, grow their firm or drive traffic. But how do you know if your efforts are working? Even more importantly, how do you take it to the next level? In this advanced social media session, we will discuss how to know if your efforts are working, what you should be benchmarking based on your goals and how to take your efforts to the next level.

### **The Top 10 Tips for Growing Your Practice**

Does your firm struggle with marketing due to time and cost limitations? Marketing doesn't have to be expensive to be effective, nor does it have to take all your time. It just has to be smart and focused, and the next \_\_\_\_\_ webinar will explain how to do it right. Presented by Sarah Johnson of Inovautus Consulting, this session will explore the top 10 ways small and medium CPA firms can start growing their practice today, the tools they can use and tips for enhancing the results of their efforts.

### **The Top 5 Tips to Growing Your Niche**

*(shortened version of the session above)*

Do you struggle with marketing due to time or cost limitations? Marketing doesn't have to be expensive to be effective, nor does it have to take all your time. It just has to be smart and focused, and the session *The Top 5 Tips to Grow Your Niche* will explain how to do it right. Presented by Sarah Johnson, this session will explore the top 5 ways CPA firms can start growing their practice today, the tools they can use and tips for enhancing the results of their efforts.

### **Best Practices for Marketing in the New Economy**

Today's market is competitive. Marketing and growing your business takes thoughtful activity that produces results. Our discussion will address where companies should be focused to generate results in the new economy as well as what has changed with how people are buying.

### **Getting the Most from Your Speaking**

Speaking is a great way to build credibility and generate leads. Whether you are brand new to speaking in front of an audience or a seasoned veteran, you learn a few things from this session. We will share some of our self-learned successes and failures to getting the most out of your speaking engagements and helping convert audience members into prospects.

### **Hiring and Integrating Marketing and Sales Talent**

It's no secret that growth is one of the top challenges facing public accounting firms. For many firms, the idea of hiring staff to help them support their growth is a highly appealing. But, where do you begin? And, how do you make sure this is a successful investment? We will show you how to know if you are ready, how to set yourself up for success, where to find the right person and what you should expect.

### **What's your ROI?**

Many firms are actively involved in marketing, but most aren't measuring it. Being able to see where you are doing well and where you could improve are keys to driving positive growth in your firm. We will show you how to measure some of the most common professional service marketing activities- like web, social media, sales, communications, client loyalty and more. We will also show you how to create a dashboard and how to interpret some of the data.

### **CPA Firm Retention Strategies**

The retention of talent is critical today. Over the next 17 years, CPA firms will be faced with significant challenges as existing owners and partners retire. Retaining your talent won't be easy. Today's talent wants to see and understand their career path. In this session, we will discuss the 4 key areas to career paths, the importance of non-traditional paths, communication strategies and the importance of technology in all of this.

### **Build Your Recruiting Pipeline**

Finding and securing talent is tough today for CPA Firms. Recruiting the right talent requires a focused, proactive plan. In this session, we will discuss how firms can approach recruiting that will help them build a solid pipeline of candidates that want to work for their firm.

### **LinkedIn - Creating a Killer Profile**

LinkedIn is the number one professional network in the world, with over 185 million members globally. Many professionals have profiles, but most aren't actively using LinkedIn to help grow their business. During this session, I will empower you to use

LinkedIn more effectively by covering what you need to know about

- Profile differentiation and optimization
- Building and growing a network
- Common questions and challenges

### **Putting Thought Leadership to Effective Use at Your Firm**

Discuss how thought leadership within your firm--and also outside of your firm--can move your reputation and business forward in ways beyond marketing and revenue growth. Also discuss the options that exist for all firm sizes, as well as individual CPAs, niche markets and the spectrum of accounting profession personalities. With many firms still not realizing the potential of content marketing, this session will uncover ideas and methods that can be put to use without eating considerable billable time, encountering a huge learning curve and enduring hours of frustration and heartache.

### **Tips for getting more PR**

Press can be one of the most lucrative forms of advertising for CPA firms. Finding press opportunities can seem like a daunting and overwhelming task. Today, there are many media channels to use. In this session, we will cover our top tips for helping you get more PR for your firm or niche practice. Our tips will cover everything from tools and resources you can use to how to pitch a reporter and the true role of press releases today.

## **Workshops (paid events only by attendee or for companies)**

### **Social Media Live Workshop**

Looking to take your social media efforts to the next level? This session will be a live workshop focused on helping you elevate your efforts. We will have experts on hand to work one on one with you one on one in each platform to help you elevate your presence, begin to benchmark and evaluate your success, identify opportunities and more.

### **LinkedIn Training Workshops**

See our LinkedIn Training web page. Training is offered for Professionals and marketers and can be delivered virtually or in-person.

### **Put Social Media Into Action**

Interested in learning and using Social Media to grow your business, recruit candidates or build your career? This session will be a live workshop focused on helping you put social media into action. This workshop will introduce you to the most popular social media platforms for CPA firms, show you common ways social media is being integrated into everyday marketing, business development and recruiting, discuss best practices in



implementing social media across the firm, and address the key things you should be communicating and expecting from employees and your marketing department around social media. This session will also include live breakouts and interaction, a facilitated roundtable to discuss your toughest questions as well as learn from each other, and an action plan you can take back to the office.

### **Building an Integrated Growth Plan**

Growth today is about more than just marketing or selling. It requires a 360 degree look at your organization. In this workshop you will learn about the key components to building and growing a practice and what high performing firms do that others don't. You will be introduced the range of tools that are available and discuss how to select the initiatives that will be the most impactful towards your growth and identify ways to blend various tactics to build a sustainable brand in the business community. This workshop will be interactive. This session will also include live breakouts and interaction, a facilitated roundtable to discuss your toughest questions as well as learn from each other, and an action plan you can take back to the office.

### **Collaborative Topics**

#### **Creating a growth culture**

*Speakers: Sarah Johnson and Angie Grissom (Rainmaker)*

In an accounting firm, people can hide behind job descriptions and past stated expectations for how they should be contributing to the bottom line. Is it your job to help promote the firm or not? In this session, we look at how typical roles in a firm from a partner role to staff accountant to Marketing Director and how each definition of the role can be limiting for the firm's growth and awareness goals. We will define what a successful growing firm looks like, where the barriers exist at each level and explore how to blur the lines for what the expectations are. The end result is a team that is not defined by a job description but a firm that is defined by how the team works together for the success of everyone.

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