



# 2020 Advisory Conference

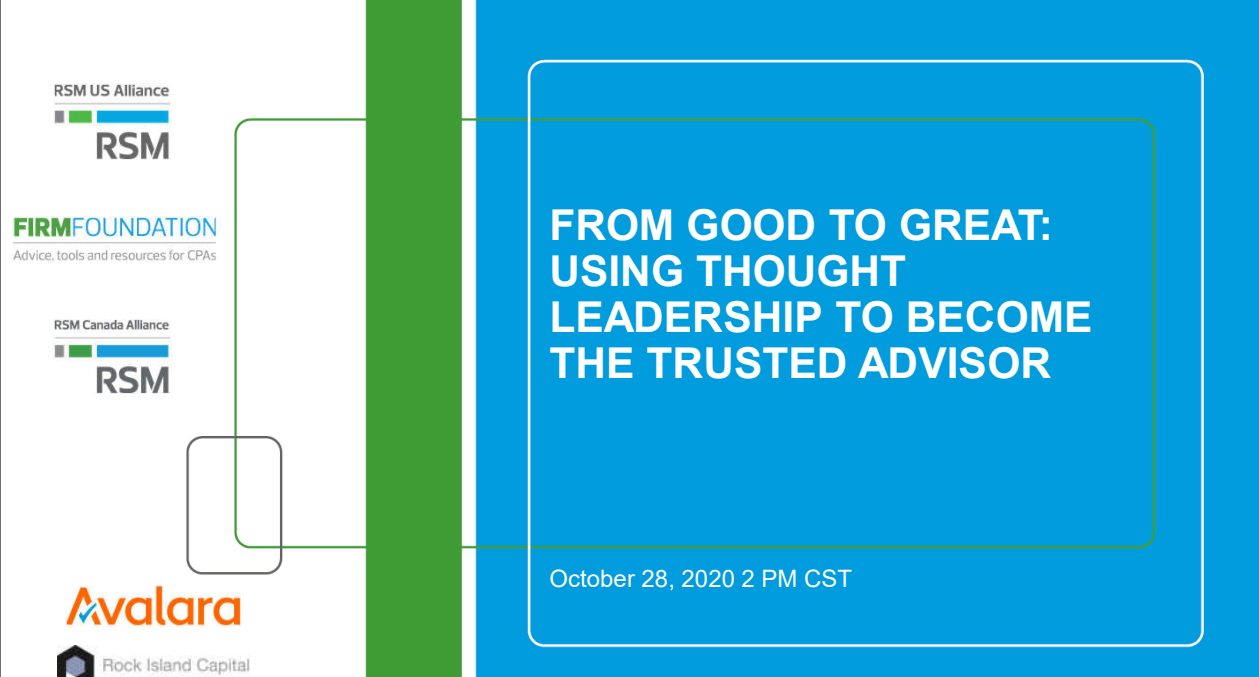
October 27–29

Converging knowledge and behaviors  
to deepen client relationships

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**FROM GOOD TO GREAT:  
USING THOUGHT  
LEADERSHIP TO BECOME  
THE TRUSTED ADVISOR**

October 28, 2020 2 PM CST

Avalara

Rock Island Capital

## Speakers list



**Don Breckenridge**  
Partner, Marketing by Numbers



**Jamie Miller**  
Partner, Marketing by Numbers



**Cheryl Siemering**  
Marketing Director, Olsen Thielen



**Lisa Dunnigan**  
Principal and CIO, Olsen Thielen



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## Agenda

Topic	Minutes
Challenges faced by accounting professionals	5
How to turn your website into a thought-leadership hub	10
Types of effective thought leadership content	5
How to communicate thought leadership content to clients and prospects	10
How all colleagues can contribute to marketing	10
RSM Alliance Member Spotlight: Olsen Thielen	10
Questions and answers	10



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## Objectives

By the end of this course, you will be able to:

- Define how to showcase thought leadership on your website
- Define the types of thought leadership content you can create
- Identify the different types of technology for managing contacts and email communications
- Identify the components of an ideal email and communication frequency
- Define specific actions that all colleagues can take to help with marketing



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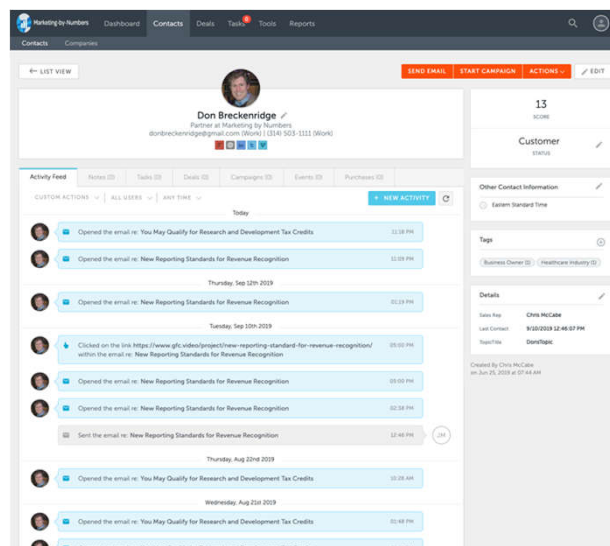


## Background



Sales and Marketing Software

- CRM + Email Marketing + Marketing Automation
- 1,000's of users globally sending millions of emails each month.
- Merged with Benchmark in Sept 2019  
Rebranded BenchmarkONE



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## Marketing·by·Numbers

Thought Leadership and Marketing  
for Accounting Firms.



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## The bar continues to raise

- ✓ Expert
- ✓ Trusted Advisor
- ✓ Thought Leader
- ✓ Connector
- ✓ “Go To” Resource



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## Important information is flowing faster than ever

Congress passes the Families First Coronavirus Response Act

TAX ALERT | March 19, 2020

CARES Act becomes law

TAX ALERT | March 27, 2020

Main Street Lending Program

RECORDED WEBCAST | April 10, 2020

SBA Paycheck Protection Program (PPP) application process now open

TAX ALERT | April 03, 2020

SBA issues additional PPP loan forgiveness guidance

TAX ALERT | August 25, 2020



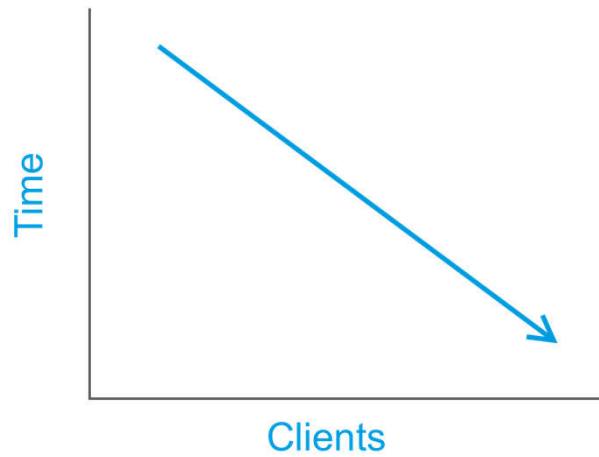
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## Your clients expect you to keep them well-informed, in a timely manner.



More Clients, Less Time.



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The solution is to leverage thought leadership and technology to bridge the gap.



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Each piece of thought leadership can be leveraged by all employees to help stay in touch, educate, build stronger relationships and better serve both clients and prospects.



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## MAKING YOUR WEBSITE A THOUGHT LEADERSHIP HUB

## Your website is the face of your firm

About Careers Request for Proposal Client Portal Payments Insights COVID-19 SOLUTIONS f t in

**PBMares**  
Your Future. Our Focus.

SERVICES INDUSTRIES PEOPLE RESOURCES LOCATIONS CONTACT

### Club Management in the Era of Covid-19

Learn more on minimizing liquidity risk and navigating cashflow challenges.

### Transitioning from Survival to Recovery

As you navigate this new business environment, leaders need the right guidance and direction to move forward. Tap into our customized **tax, audit, accounting** and **business advisory** solutions to help you recover from disruption and grow stronger. **Contact a PBMares advisor today.**

**INSIDE INSIDE**  
PUBLIC ACCOUNTING PUBLIC ACCOUNTING

## Resource Center

Provide thought leadership, showcase your expertise, educate prospects and clients, and generate intelligent conversations.

Recommendations:

- Create a resource center
- Add content that your clients and prospects will find valuable



Home Business COVID-19 Tax Alerts Case Study Insight Article White Paper Financial Reporting Insights Article M&A and Compliance News Infographic

### Revised Form 941-X

By RMW US LLP | September 22, 2020 | Business, COVID-19, Tax Alerts

The final version of Form 941-X, Adjusted Employer's Quarterly Federal Tax Return or Claim for Refund, has been released by the IRS.

[Read more](#)

### The telehealth explosion has changed health care delivery forever

By RMW US LLP | September 18, 2020 | Article, Business

Even if the storm is leveling off now, we do not expect telehealth use and investments won't go back to pre-pandemic levels.

[Read more](#)

### 5 considerations if your client files for bankruptcy

By RMW US LLP | September 15, 2020 | Business, Insight Article

Companies must minimize financial exposure and maximize their potential recovery if their business courts back bankruptcy.

[Read more](#)

### Family office document retention: FAQs about how to manage risk

By RMW US LLP | September 11, 2020 | Business, Insight Article

These FAQs help family offices take a look at document management and retention practices, policies, technology systems, and procedures.

[Read more](#)

### Oil prices show record volatility in 2020: Path to recovery uncertain

By RMW US LLP | September 10, 2020 | Business, Insight Article

The unprecedented imbalance the oil market has seen in 2020 has generated extraordinary responses from both oil producers and oil consumers.

[Read more](#)

### Goodwill impairment testing when carrying amount is trending downward

By RMW US LLP | September 10, 2020 | Business, Financial Reporting Insights

RMW discusses goodwill impairment testing when a reporting unit or an entity has a downward trending positive carrying amount.

[Read more](#)

### Accounting for CARES Act provisions specific to health care entities

By RMW US LLP | September 10, 2020 | Business, COVID-19, Financial Reporting Insights

The AICPA has issued answers to accounting questions regarding certain CARES Act provisions specific to health care entities.

[Read more](#)

### Accounting and reporting when in reorganization under Bankruptcy Code

By RMW US LLP | September 10, 2020 | Business, White Paper

A summary of the guidance entities should apply when undergoing a reorganization under Chapter 11 of the Bankruptcy Code.

[Read more](#)

### 8 ways to optimize spending within your existing technology budget

By RMW US LLP | September 10, 2020 | Business, Insight Article

There are several opportunities to gain more efficiency, productivity and save within the parameters of an existing technology budget.

[Read more](#)



The screenshot shows the GreerWalker CPAs & Advisors website. The header includes the company logo, contact information (704-377-0239), and a navigation menu with links: HOME, INDUSTRIES, SERVICES, PEOPLE, ABOUT, LOCATIONS, NEWS & RESOURCES, and CAREERS. A 'Client Portal' link is also present. The main content area is titled 'Resource Center' and features a 'GreerWalker Growth and Profit Diagnostic Tool' with a 'Learn More' button. Below this is a filter bar with options: All, Article, Business, COVID-19, Individual, and Tax Alert. A grid of resource cards is displayed, each with a title, a GreerWalker logo, and a 'Video Resources' link. The cards include: 'Guidance on PPP Loans of \$50,000 or Less', 'Donor-Advised Funds: Giving with a Tax Advantage', '2020 Mid-Year Tax Planning Tips', 'Scenario Planning: Prepare for the Unexpected', 'Succession Planning for Business Owners', 'Paycheck Protection Program Flexibility Act of 2020', 'The CARES Act: 3 options for midsize businesses (Authorized by RSM US LLP)', and 'Dealing with Today and Planning for What's Over the Horizon'. Annotations on the left side point to the 'Easy to Find' filter bar and the 'Show multiple topics per page' grid. An annotation on the right side points to the 'NEWS & RESOURCES' link in the header, stating 'Make it front and center'. The footer includes the Avalara and Rock Island Capital logos on the left and the RSM logo on the right.

Make it front and center

Easy to Find

Show multiple topics per page

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## Be strategic with content creation

Address topics applicable to different industries, demographics and service areas.

Promote all of your services through education.

Better understand each contact's needs and interests based on what they read.

The screenshot shows the BT&Co website with a grid of 12 educational content cards. Each card has a title, the BT&Co logo, a 'Video Resources' link, and a category. The cards are: '10 Tips for Managing a Remote Workforce' (Business, COVID-19), 'All About Equity Crowdfunding' (Business, Individual), 'Contingency Planning for Business Owners' (Business), 'Nine Year-End Tax Strategies for 2019' (Individual), '7 Internal Controls to Prevent Fraud' (Business), 'Do I Need a Will?' (Individual), '7 Tax Minimization Strategies for Investing' (Individual), 'LLC vs. S-Corp: What's the Difference?' (Business), 'Strategies for Estate Planning' (Individual), 'Safe Harbor 401(k) Plans' (Business, Individual), 'Cash Balance Retirement Plans' (Business, Individual), and 'Opportunity Zones' (Business, Individual). The footer includes the Avalara and Rock Island Capital logos on the left, the copyright notice '© 2020 RSM US LLP. All Rights Reserved.' in the center, and the RSM logo on the right.

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## Create great content

You can create content in-house or leverage third-party resources.

Recommendations:

- Assign a coordinator; management should reinforce the importance of content
- Create content internally when feasible (articles, webinars, videos, etc.)
- Leverage RSM Content (alliance members)
- Hire a third-party writer(s) (WritersAccess.com, Zerys.com)
- Leverage branded third-party content (i.e. Thompson Reuters, Marketing by Numbers)
- Minimize curated content that takes visitors to an unrelated site



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The screenshot shows a webpage from PBMares titled "How the Payroll Tax Deferral Works for Employers". The page features a large image of the US Capitol building. The text discusses the deferral of employer social security payroll tax obligations due to COVID-19, as announced by President Trump on August 8, 2020. It explains how the deferral works, including the rate of deferral (6.2% of wages up to \$137,700) and the requirement to repay the deferred taxes by January 1, 2021, and April 30, 2021. The page also includes a "CONNECT WITH US" section with a contact form and a "SERVICES" section listing various business services.

## Consider using video

Convey and explain complex topics in an engaging manner.

Showcase various experts within your firm.

Showing colleague's personalities will help build trust.

Recommendations:

- Use your mobile phone as your teleprompter and video recorder
- Keep videos short – between 4 and 6 minutes
- Be sure to have good lighting and use a lavalier microphone



The screenshot shows a webpage from BT&Co. titled "Donor-Advised Funds: Giving with a Tax Advantage". The page features a video player with a man speaking. The text lists the advantages of a DAF: maximizing tax deductions now, easily donating non-cash assets, and reducing or avoiding capital gains tax on appreciated assets. Below the video, there is a "Download our Whitepaper" section with a link to view the whitepaper, and a "Let's Talk!" section with a contact form for a consultation.

## Schedule webinars

Showcase your people and expertise.

Effective way to engage both clients and prospects.

Recommendations:

- Leverage referral partners (lender, attorney, etc.)
- Post webinar recordings to your resource center
- Create a follow up strategy with attendees



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**HARDING, SHYMANSKI & COMPANY, P.S.C.**  
Certified Public Accountants and Consultants

About Us Services Industries Events Resources News Contact Us

Back to the Resource Gallery

### PPP Loan Forgiveness: Part III

Let's Talk!

You can call us at (800) 880-7800 or fill out the form below and we'll contact you to discuss your specific situation.

First Name  Last Name

## Generate intelligent, qualified conversations

Let the content provide a basic education on a topic.

Let the content filter interested and qualified contacts.

Provide multiple methods for the client or prospect to contact you.

Use an online form to capture new leads and prospect.



**BT&Co.**  
Certified Public Accountants

HOME RESOURCES ABOUT US OUR SERVICES CAREERS BLOG CONTACT PAY NOW

### Donor-Advised Funds: Giving with a Tax Advantage

**Advantages of a DAF**

- Maximize tax deductions now, but donate over time.
- Easily donate non-cash assets.
- Reduce or avoid capital gains tax on appreciated assets.

Download our Whitepaper

Click below to view our in-depth whitepaper.

Let's Talk!

You can call us at (785) 234-3427 or fill out the form below and we'll contact you to discuss your specific situation.

First Name  Last Name

Email Address


Area Code  Phone Number


Contact Us

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# BETTER COMMUNICATE WITH CLIENTS AND PROSPECTS

## Get Organized

Centralize your contacts in order to better communicate, track engagement and identify opportunities.



Recommendations:



- Utilize a CRM with email capabilities
- Centralize contacts
- Send emails
- Segment contacts by demographics, industry, service area, etc.



Enterprise CRMs and Marketing Automation


All-in-One Sales and Marketing CRMs



Email Newsletter Systems











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## Firm Email Strategy

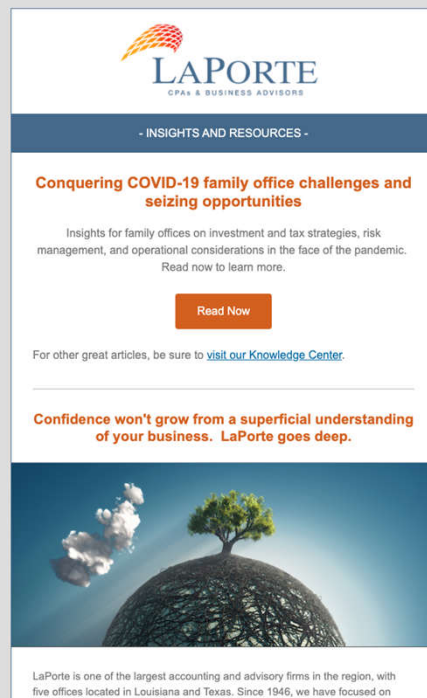
Communicate valuable information that further establishes you as the trusted advisor...and keeps you in front of the client.

### Recommendations:

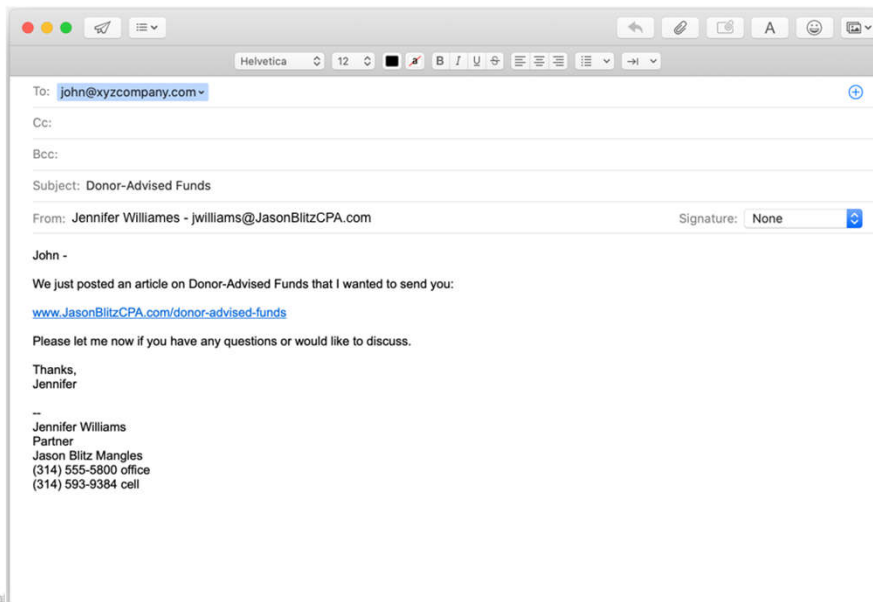
- Send 2 – 4 emails per month
- Each email should deliver value
- Send relevant information to segmented contacts if possible
- Limit to one topic per email
- Don't make your email a book
- Have a clear call to action
- Track engagement



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## The most effective email for all



## Social Strategy

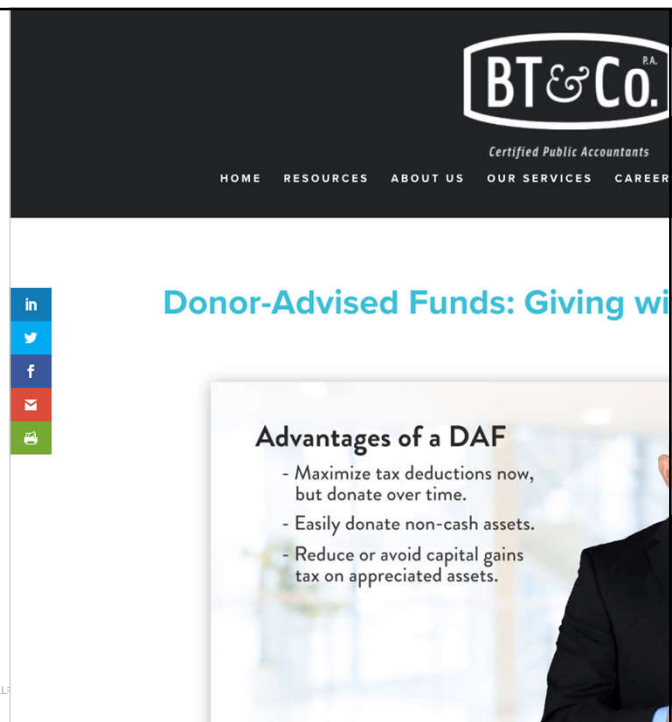
Draw prospects to your website by posting content to social feeds.

Recommendations:

- Have social posting buttons on all landing pages
- Notify all colleagues to post new content to their personal social feeds
- Don't be afraid to post the same content multiple times



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# MARKETING IS A TEAM EFFORT

## Marketing is a TEAM effort

Marketing may be charged with creating thought leadership, but...

**all colleagues can help identify thought leadership topics and contribute their expertise to help with content.**



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## Marketing is a TEAM effort

Marketing may be charged with coordinating webinars, videos, speaking events and conferences, but...

**all colleagues can watch for opportunities to participate and share their expertise.**



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## Marketing is a TEAM effort

Marketing may be charged with sending mass emails, but...

**all colleagues can send clients, prospects and referral sources personalized emails with an article or other valuable content.**



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## Marketing is a TEAM effort

Marketing may be charged with posting content to the firm's social properties, but...

**all colleagues can post and share content on their personal social properties.**



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## Marketing is a TEAM effort

Marketing may be charged with managing the contact list, but...

**all colleagues can help with adding to and updating the contact list.**



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## RSM Alliance Member Spotlight: Cheryl Siemering

The screenshot displays the OlsenThielen website. The left sidebar features a 'Q&A Over Coffee' section with the text: 'Depend on Our People. You want partners who understand your business and its unique needs. Partners who are proactive, experienced and knowledgeable... OlsenThielen, we pride ourselves on our history of building long-lasting partnerships with our clients. Our focus is on helping you achieve your specialized skills and principles, and are committed to delivering outstanding service and value to your business. Count on Our Advice. Today's business environment presents ever greater challenges and requires you to draw upon all your strategic and advisory resources of services and industry expertise that you might find in a larger firm, with the personalized attention of a smaller firm. You can rely on today, but your vision for the future. OlsenThielen is a full service accounting and consulting firm, and a "Top 20" firm in Minneapolis and St. Paul, Minnesota. We focus on accounting and tax services, as well as non-traditional services like valuations, business succession planning, employee benefits and human resources planning, and fraud and forensic accounting. OlsenThielen was founded on the belief that personal attention, trust, and quality service were the key elements to helping our clients' growth can be attributed to building strong relationships with our clients and continuing to earn their trust. Learn about what makes us different. THE OLSEN THIELENS EXPERIENCE.

The main content area is titled 'Resource Gallery' and features a grid of resource cards. The cards are categorized by tabs: All, Business, COVID-19, and Individual. The visible cards include:

- Guidance on PPP Loans of \$50,000 or Less (Business, COVID-19)
- What if Your Customer Files Bankruptcy? (Business)
- Donor-Advised Funds: Giving with a Tax Advantage (Individual)
- 2020 Mid-Year Tax Planning Tips (Business, COVID-19, Individual)
- 8/8/20 Executive Order: Payroll Tax Deferral (Business, COVID-19)
- Payroll: Changes to Form 941 (Business)
- The Benefits of a Fractional CFO (Individual)
- Scenario Planning: Preparing for the Unexpected (Individual)

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