



**83rd Annual** SYMPOSIUM

# Branding Tips for CPAs

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# Why me?

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- A winding career path...
  - Deloitte -> Banking -> Wall Street -> CPA firm -> Financial wellness coach -> sole proprietorship
- Insider understanding of the CPA world AND the marketing world
- AICPA financial literacy efforts
  - Media spokesperson
  - Feed the Pig
- Rebranding project for Chicago CPA firm



# Agenda

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- What is branding and why should you care?
- Creating a positioning statement
- Quick tips to implement effective branding

# POLL QUESTION:

What is branding?

- a. Your website, logo, letterhead, etc.
- b. Ad campaigns, social media, sponsorships
- c. How you recruit, hire and retain employees
- d. How you answer the phone and introduce yourself
- e. All of the above

“Your brand is your total **experience**, as **perceived** by those you **seek to motivate**.”

- *Matthew Fenton, branding expert*



A person's hand is pointing at a document on a wooden table. The table is covered with various branding materials, including sticky notes, color charts, and design sketches. The background shows a blurred office setting with a desk lamp and a coffee cup.

# What is branding?

In short: it's everything you do

# Why should you care about branding?

- The 80/20 rule
  - Customers
  - Headaches
  - Time management
- Branding provides clarity
- The power of NO
  - aka: Your niches are your riches
- Prioritizes what you say and what you do (and don't) do



This isn't about TikTok

It's about:

- Who you are
- What you stand for
- Who you wish to serve
- What they get from you

**Your niches are your riches:**

- Who do you WANT to work with?
- What do they value?
- Are you willing to give that to them?
- What DON'T they value?
- Can you stop doing that?

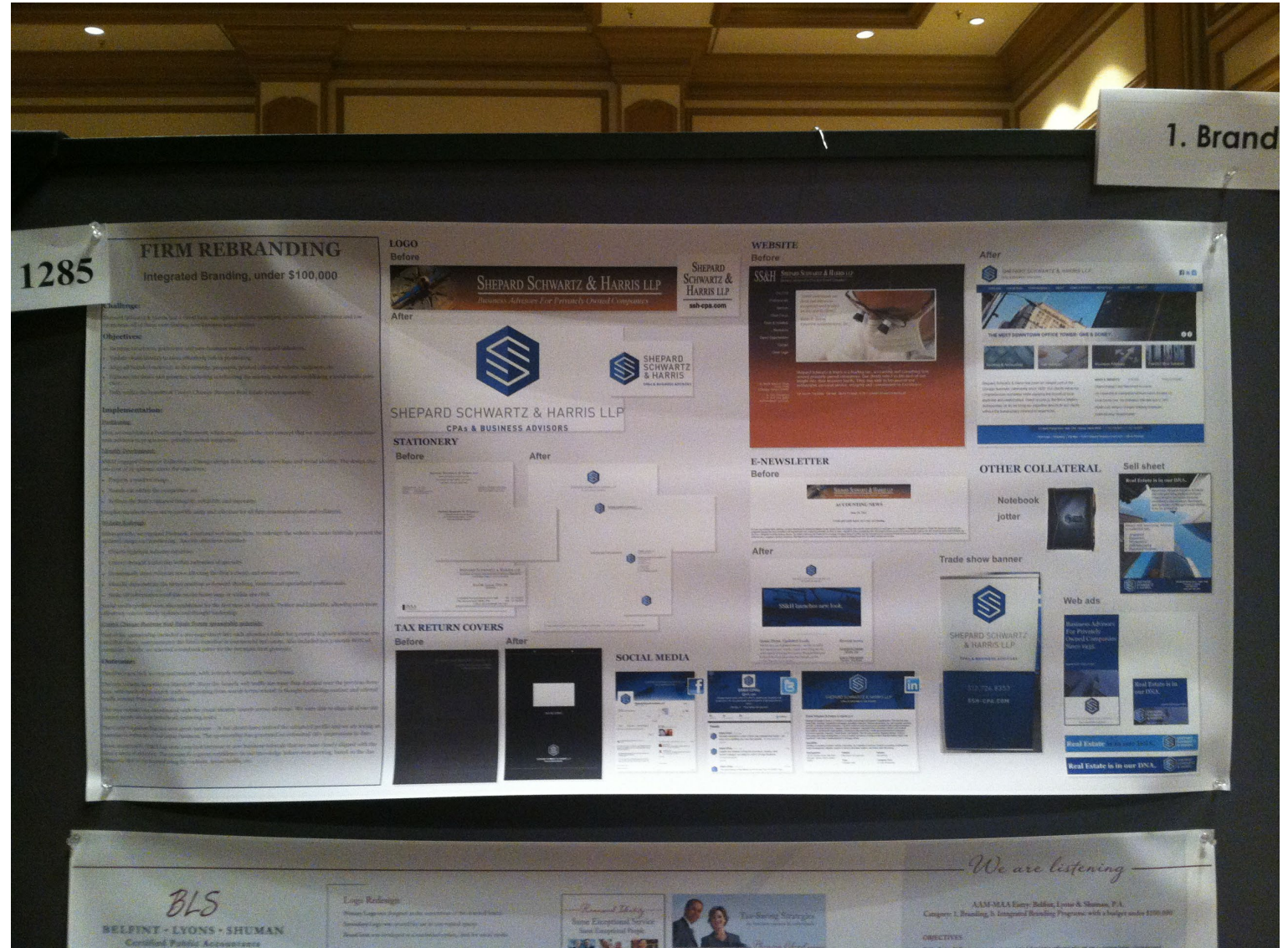


FINANCIAL BLISS  
with Kelley Long



# Case study: Shepard Schwartz & Harris, LLP

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# Creating a branding strategy

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- It starts with a brand positioning statement





# What is “positioning?”

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- A positioning statement is a **clear** statement of how you **will be perceived** by those you seek to motivate.

It is...

- Visionary: not where you are, but where you want to be (think 5 – 10 years out).
- For internal use only: not to be confused with messaging.
- A guide for what you **say** and what you **do**.
- Simple
- About ideas first, then words.





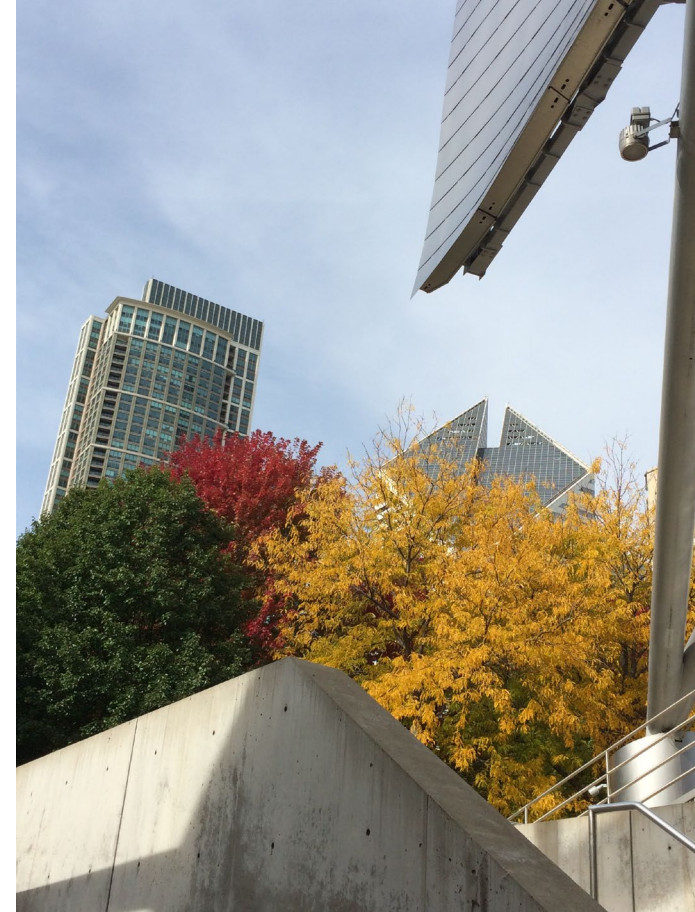
## 3 key questions

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- **Target market** – Who do you serve or wish to serve more of?
- **Uniqueness** – What makes you different?
- **Benefit** – What do they get?

# SS&H example: Who do we serve?

- Privately-owned, established businesses and their owners who:
  - Deal with a variety of challenges
  - Have entrepreneurial, visionary owners
  - Take calculated risks
  - Take advantage of market challenges
  - Seek a relationship beyond a liquidating event
  - Perceive themselves to be high-end, elite, with status
- Specific industries



# SS&H example: What makes us different?

- Pulse on client industries
- Identify the problem before it's a problem
- Creative
- TRULY care (clients & staff)
- 24/7, Blackberry\*\* world
- Up-to-date
- Collaboration
- Responsive, available
- Access to “top of the house”



# SS&H example: What do they get?

- Clarity
- Peace of mind
- Stability
- They're not alone
- Security
- Sleep at night
- Value for their dollars



# The result:

Shepard Schwartz & Harris collaborates with progressive, privately-held businesses to provide proactive, relevant solutions through all stages of business ownership and beyond. We are creative problem-solvers with our thumb on the pulse of our client industries. We enable our clients to make financial decisions with confidence and clarity. We create value for our clients and provide a great place for smart, engaged employees to work.



# Getting started: creating your positioning statement

- What niches do you wish to serve?
  - Hint: if you serve everyone, then you serve no one well
- Who do you really enjoy working with?
- What problems do they share in common?
- What do they value and are you willing to give them that?
- What are you doing that they don't value, and can you stop doing that?

# Prioritizing your brand strategy

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- What you say (messaging)
  - Does your marketing match what your niches search for?
  - Does it reflect the position you're stating for your firm?
- Where you say it
  - Where do your clients look for the services you offer and can they find you there?
    - Local news sources (PR strategy)
    - Newsletter
    - Blog if you want to educate and drive traffic to your site
    - Social media, if relevant
      - Yelp, Google page, LinkedIn
- What you do and how you do it
  - Onboarding new clients
  - New employee orientation
  - Scheduling, data collection, invoicing – what's the client experience?

# Visual brand alignment – the easy part

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More  
than  
just a  
logo...

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Fonts

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Colors

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Website

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Letterhead

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Employee bios

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Slide decks

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Proposals

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Email signatures

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# SSH: Brand update priorities

## Experience:

- Client onboarding
- Calling into the firm
- Interview process
- Self-managed 401k
- Tax return delivery
- Billing
  
- Visual brand assets

## Perception:

- Disorganized, small firm feel, too much paperwork
- Small firm, older clientele
- Too busy, loose standards
- Cheap, fiduciary risk
- Inefficient, old-fashioned
- Cheapest, unsophisticated
  
- Cheap firm, older partners, tech resistant

## The fix:

- Streamlined process for every new client
- New phone system
- Formalized process
- Single provider
- Updated online portal
- Centralized billing customized to visual brand
  
- Updated visual brand

# Quick branding wins

- Match your LinkedIn to your website bio
- Choose one font for all written/digital correspondence
- Phone greeting and voice mail messages
- Welcome email for all new clients
- Standards for response times
- Email signature
- Top 5 clients and why

# Key takeaways

## Branding is...

Everything you do

- Onboarding clients
- Interviewing staff
- Answering the phone
- Billing
- Email response time
- Delivering tax returns

## It starts with...

Your positioning statement

- Who you serve
- What makes you different
- What they get

## Aligning your brand

Prioritize & plan the experience

- What do you say?
- Where do you say it?
- What do you do?
- How do you do it?
- Does it motivate the target?



# Questions?

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