

Highlights from the

Boomer Marketing & BD Circle

Winter 2021

Highlights from the Boomer Marketing & Business Development Circle™ – 2021 Winter Meeting

The Boomer Marketing & Business Development Circle™ is a community of marketing and business development professionals from forward-thinking firms who are committed to aligning marketing and business development initiatives with firm strategy. Learn more at www.boomer.com/mbdc.

This March, members met virtually to share knowledge and build relationships with peers. The discussions centered around the following topics.

- **Boomer Briefing (Predictions)**
 - A lot has changed in the profession recently, and how firms approach their growth strategies is changing as well.
 - A discussion on the latest growth strategies in use inside and outside of the accounting profession, including upskilling talent, increased use of virtual meetings, focusing on the customer experience, digital sales and marketing.
- **Revolutionize Your Firm's Marketing Efforts with Technology**
 - In this fast-paced session, Becky Livingston of Penheel Marketing shares marketing initiatives for forward-thinking firms.
 - Ideas include using artificial intelligence to create visitor-focused content, how voice search impacts your firm's SEO efforts, how a domain change affects search rankings, and why an annual SEO audit is crucial.
- **Marketing and Business Development Exchange**
 - Each member brought an item, resource, project or marketing technology that they developed or use internally to share with the group
 - Examples include creating a client-facing firm annual report, business resource groups, and defining the firm's internal and external differentiators.
- **Essentials of Client Experience and Client Journey Mapping**
 - It seems as though every firm is talking about the client experience or client journey mapping. The number of vendors, methods and best practices can be overwhelming.
 - This session discussed a framework and process for facilitating a client experience/client journey mapping project to help marketing leaders in these initiatives.
- **New Positions on the Marketing Team**
 - Members discussed the types of new positions they're filling on their marketing teams.
 - Some roles include Digital & Content Marketing Associate, interns to handle social media and mailing list cleanup, Marketing Manager, and Content Development Specialist.

- **Marketing Metrics**
 - What marketing metrics are our members tracking in their firms? How are they being tracked, and how are they helpful?
 - Some ideas shared include new leads, new business won, how COVID content impacts leads.
- **Using Microsoft Teams to Support Marketing & Business Development**
 - With many firms relying on Teams for communication while working remotely, members discussed how they're using this tool to support marketing and BD activities, including creating channels for DEI and women's initiatives and sharing meeting materials.
 - Members also discussed other tools they're using for M&BD communications, including Asana, Planner (Part of Office365 Suite), and CRM systems.
- **Accountability Review**
 - Each month, our members share their top strategic growth initiatives and are held accountable by their peers.
 - Some of the initiatives shared this month include lead scoring, client experience initiatives, refreshing service messaging and creating a video blog.
- **Future Planning**
 - Gary Boomer shared some final thoughts with the group, saying he would encourage managing partners to look at marketing and business development from a strategic perspective.
 - M&BD professionals have the strategic knowledge but need more internal and external resources to get things done. If given these resources, it would reduce the cycle time to generate new leads and win new business.

It's impossible to cover everything we discussed at the Boomer Marketing and Business Development Circle in this short summary. However, the trends described in this report should give you some insight into the marketing and business development challenges and solutions that firms are thinking about today.

An Invitation to Participate in the Boomer Marketing and Business Development Circle™

To learn more about the Boomer Marketing and Business Development Circle community, please visit <http://www.boomer.com>.

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