#### **CPA** Practice **Advisor**

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How do you make a silk purse out of a sow's ear? Said another way, how can you transform the tried-and-true firm bio into something more than a ho-hum template piece of writing that resonates with clients and prospects?

\*\* MarketingWorks: an Online Exclusive column \*\*

# A Little Back Story

Recently, I was asked to provide a quote on what it would cost for me to rewrite bios for seven partners of a fairly large local firm. I took a look at the bios and then called the marketing director to discuss. The director told me the partners wanted the bios rewritten and freshened up to coincide with a website redesign. But there was a wrinkle. The director confessed that most of the practitioners didn't have a whole lot to talk about in their bios other than the usual stuff — their titles, job description

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"dug" deeply enough with each partner to truly discover some of the hidden gems. Second, the partners may not have taken this exercise seriously enough. Either they hadn't been schooled in the importance of discussing their experience and intellectual capital, or perhaps they didn't really care at all about having a bio in the first place.

I can only guess as to the actual *why*, yet it got me thinking about all the creative ways to take a bio that is a Happy Meal, at best, and make it supersized. No matter what size firm you are ... or what each person may do beyond the firm's physical borders, here are a few tips.

# **Apply Themes to Your Bios**

Instead of the traditional bio, come up with a theme that might also be included throughout your site or in your marketing materials.

One firm, for example, referred to each one of its partners as super heroes. I found this out quite by accident when I was interviewing the managing partner about his company. The interview was ... well, a little mundane, but my ears perked up when he referred to his director of IT as the "Green Hornet." It turns out each partner and director had a superhero nickname, so each bio was written with this in mind. Here's part of one for an example:

#### John Smith, CPA — "Superman"

Able to leap tall buildings in a single bound, John Smith, director of IT for XYZ firm, offers a unique approach to helping his clients manage their IT function. He avoids using Kryptonite in lieu of sound business continuity best practices. When he isn't saving companies from backup failure, he can be found volunteering his time at the local animal shelter where he uses his X-Ray vision to ensure all animals are safe, cared for and adopted. If you see another firm with a great way to handle its bios, reach out to the firm to

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- what energizes you about what you uo.

- What's your favorite client success story?
- I'm happiest when I can \_\_\_\_\_ (and apply the answer to a business case).
- I like to help others because \_\_\_\_\_ (discusses volunteer activities).

If your firm is a little more adventurous, try to get creative with your questions or statements:

- Clients are like my favorite book, "Lonesome Dove." I like to see them ride into the sunset with blue-sky ideas on how to build business and influence their customers.
- It's 4<sup>th</sup> quarter, first and 3 at the 5-yard line. I help my clients win the big game by giving them access to our firm's portal, or the technology they need to interface with us on *their* time, not ours.

### Get the Managing Partner's Buy-In

I'm sure you were expecting other creative ways to write a bio. Do some research on your own online. There is, however, one step that should be intuitive, but often it's not.

I know some managing partners who know activities like bio development needs to be done, only to agree with the partners that their time could be better spent in billable activities. You absolutely have to get buy-in from the very top in order to get the partners to fall in line and participate in this or any other marketing activity. In some firms, this happens organically because the managing partner sticks to his or her foundational beliefs to make the most of marketing in order to retain clients and get new ones. After all, isn't that the point of this whole exercise?

# Don't Forget the Goal

I can't overemphasize the goal around writing great bios, and I don't mind repeating

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