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management, strategy and partner issues. President of his own Chicago-based consulting firm, The Rosenberg Associates, he is founder of the most authoritative annual ...

Feb. 09, 2016

Art Kuesel is a rising star in the world of CPA firm marketing. With 14 years of solid CPA firm experience under his belt, Art started his own firm, Kuesel Consulting, three years ago. He works with CPA firms in sales coaching, sales and marketing training and creating and implementing growth plans, often often serving as firms' outsourced marketing director. Art has been named as a Top 100 Most Influential Person in Public Accounting. His clients include scores of the Top 250 Firms including a third of the T100.

I invited Art to speak to my three Chicago area roundtable groups recently. Here are some nuggets Art shared with us.

The way to finish a job. When you complete a client project, instead of asking "is there anything else I can help you with," Art suggests an alternative: ask if the client needs help in a specific area like estate planning or R&D credits.

Be proactive. Art asked the groups: "How many of you do succession planning for your clients?" Half said yes. Next he asked: "How many market it proactively to your clients?" Almost none raised their hands. I think you get the message.

Don't forget the kids. A Baby Boomer partner said that he recently realized that his main focus for 30 years had been entirely on the owners and has virtually ignored their children. If a firm hopes to retain clients that undergo generational changes in command and control, the partners need to make it a priority to forge relationships with the children, preferably with the assistance of younger personnel at your firm.

Specialization. While Art was working with a firm on growth, the partners realized

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Mentoring. When partners meet a prospect, they should take a young staff person with. There is no greater way to train staff in practice development than to observe how the pros do it. I added: "This is also a great form of leadership development. When prospects see the younger person accompanying the partner, they understand what's going on. They see that they are hiring a team, not an individual and that most of the work will be performed by the staff person and not the partner, thereby making it easier for partners to leverage themselves.

When to market. Old school: practice development must be done before 8 and after 5 and on weekends. New school: though clients and prospects will continue to be wined and dined after hours, these days, the majority of business development is done during the work day.

- Website tip #1. Art shared a fascinating revelation: Studies show that the most visited page on firms' websites is the one containing partner bios. Make sure the presentation of your bios are well written and appealing.
- Website tip #2. "A good web site usually doesn't bring in much new business, but a bad web site will lose you business.
- Website tip #3. The eternal but challenging question in marketing: How can we measure the return on investment of marketing initiatives? Art suggested one way: After launching a marketing promotion, see if there is any change on hits to your website.

Marketing is a key ingredient to your firm's success, but there's a lot more involved in growing revenue year after year. For additional insight please consult What *Really* Makes CPA Firms Profitable.

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Marc Rosenberg is a nationally known consultant, author and speaker on CPA firm

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