

Highlights from the

Boomer Marketing & BD Circle

Winter 2022

Highlights from the Boomer Marketing & Business Development Circle™ – 2022 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 (Growth)**
 - A lot of change is happening in the profession. As a result, how firms are approaching their growth strategies is changing.
 - In this session, we discussed the latest strategies firms are using as well as strategies from outside of the accounting profession, including defining target clients, packaging and pricing services and marketing metrics.
- **Building the Marketing Department of the Future**
 - The function of marketing plays a more significant role in firms than ever before. Combine this with the increase in outsourcing and automation, and the marketing department of the future will look different.
 - We discussed the various approaches firms can take to building out their marketing departments in this session.
- **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.
 - Some of the tools and resources shared include email and mail campaigns, brand and design guidelines, content calendars and podcasts.
- **Creating a Firm-Wide Business Development Strategy (Part 1)**
 - Firms have evolved their expectations of the role of business development. What was once a “one size fits all” approach to BD training has turned into creating more customized training approaches dependent on the role in the firm.
 - In this session, several members of our Circle shared strategies they’re using today.
- **Revenue Goal Setting**
 - Revenue goal setting is crucial as it gives the firm something to aim for, helps communicate priorities, aligns and focuses the team and allows the marketing team to work backward to build a strategy.
 - In this session, we provided a framework for revenue goal setting so firms can start taking the actions needed to generate leads.
- **Moving Back to In-Person Meetings**

- We were happy to share that we plan to offer in-person options for all of our M&BD Circle meetings in 2022.
- However, we aren't just going "back to the way things were." Moving forward, we will continue to consider various ways for members to participate while providing the best experience for each of our members and doing everything we can to provide a safe and comfortable environment.
- **Talent Needs**
 - The "war for talent" doesn't just impact accounting and advisory roles within firms – it's also being felt by marketing and business development teams.
 - Members discussed the strategies they're using to fill their talent needs, including outsourcing to freelancers and traditional hiring.
- **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 rebranding, transitioning from one content management system to another, proposal software, and client satisfaction surveys.
- **Action Plan & Peer Sharing**
 - Personal planning time is essential for all professionals. Before adjourning, our members thought about and shared the actions they intend to take in the next six months.
 - Some of the initiatives our members are committing to include marketing automation tools, creating more video content, and investing in data analytics.

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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