

Creating a Culture for Business Development and Growth

Situation

Fitts, Roberts & Co., P.C., a local, independent CPA firm, needed two things – they needed to distinguish themselves from other CPA firms in the area, and they needed to maintain and grow their business.

They also had a partner pool that was close to the same age, and many were set to retire in five to 10 years. Like most CPA firms, their approach to partners becoming rainmakers was to say, “Congratulations, you are a partner, now go get a book of business.” The problem is no one ever trained the potential partners on how to get a book of business.



How Michelle Tanner Communications helped

This is a familiar situation to us, so we knew how to approach the partner team to get buy-in. After all, no one trained them. The managing partner agreed to quarterly “marketing” meetings for staff on the partner track. We started with the basics: how to introduce yourself, how to explain what you do, how to recognize potential client opportunities, and more tools for the team to use. Working with Firm members, we also solidified messaging– what is the unique value position of the Firm, how is it different from other firms, etc.

Michelle Tanner was able to significantly raise the firm’s awareness for marketing, including the younger staff. She made marketing seem less complicated for the employees; something they can do daily whether working at a client office or meeting people in a social setting away from work.

Kathy Gibson, Shareholder

We also created **personal business development plans** for staff members closest to becoming partners at the Firm. This created a step-by-step program to help build their books of business. Each plan was unique based on area of practice, industry specialization, business development interests, and more.

Results

Each of the targeted people became partner, and four of the five became equity partners in the Firm. Additionally, the Firm has a unique identity from other local CPA firms, and people understand how the Fitts, Roberts helps businesses succeed. Other staff members requested to join the marketing training to learn how to build a book of business and several successfully brought in new clients. Fitts, Roberts now has a successful next generation of partners.

For more information on how Michelle Tanner Communications can help you, please contact us at 214-707-6156.