



KUESEL
consulting

Driving growth from the inside out.

Finding Growth @ your Firm

Presented by Art Kuesel

*312.208.8774 or
art@kueselconsulting.com*

Take the Fast Lane to your Destination



Client Profiles	3
Key Observations/Heard on the Street	4
Trends in Fueling Growth	6
Services to Fuel Growth @ your Firm	9
Why Kuesel Consulting?	30
Bio & Contact Info	32
Favorite Recipes	34

Client Profiles

MP's and Partners-in-Charge of Marketing

Firms with 2-20 Partners without Strategic Marketing in-house

Applicable Services:

- ◆ Managing Partner Coaching – Growth
- ◆ 1:1 Sales/Marketing Coaching
- ◆ Marketing/Sales Skills Workshops
- ◆ Growth Plan Development and Implementation
- ◆ Sales and Marketing Recruiting
- ◆ Keynotes and Presentations for Retreats

Marketing Director, Firm Administrator, COO

Firms from 10-200 Partners

Applicable Services:

- ◆ 1:1 Sales/Marketing Coaching
- ◆ Marketing/Sales Skills Workshops
- ◆ Sales and Marketing Recruiting
- ◆ Keynotes and Presentations for Retreats

Executive Directors @ Associations

All Size Associations

Applicable Services:

- ◆ Keynotes and Presentations for Retreats and Conferences

Key Observations and “Heard on the Street”

- 1) Growth is critical to succession, yet selling new work has never been harder
- 2) Pricing strategy is a significant challenge to winning profitable work
- 3) Making a decent realization on new clients is harder than ever
- 4) Predicting competitors is nearly impossible
- 5) Once predictable clients aren't necessarily predictable anymore
- 6) Growth isn't coming from compliance services/traditional avenues
- 7) Rainmakers can't feed the firm like in the past
- 8) We struggle with cross-selling and internal partner trust

Key Observations and “Heard on the Street”

- 9) Many partners aren't cut out to sell in today's environment
- 10) Consolidation creates market confusion/turmoil/opportunities
- 11) Recruiting the right talent for the future of the firm is critical
- 12) We have few future partners within our firm right now
- 13) Retaining the best people remains critical, developing our next generation is a priority
- 14) Synchronizing a marketing message across growing channels is challenging
- 15) Leveraging technology for marketing and sales is a key strategy
- 16) Content marketing strategy is critical
- 17) I need a drink!



Where will you Find Growth for your Firm?

Key Trends in Fueling Growth

- ✓ Agree on an Overall Growth Strategy
- ✓ Annual Strategic Revenue Mapping (just like we do for our clients – “projections”)
- ✓ Individual, Practice, Niche revenue goals with measurement and management
- ✓ More Strategic Marketing and Sales Leaders
- ✓ Business Development Executives (pure sales)
- ✓ Strategic M&A (boost niche depth, grow strategic markets)
- ✓ Internal Talent Development Programs
- ✓ Start-ups of New Practices/Niches/Services (needs significant firm underwriting)
- ✓ “Direct Admit” Partners to start Key Practices
- ✓ Stronger Firm Infrastructure (CMO, COO, CIO, CPO with decision making authority)

What are your Growth Priorities in 2014?



Services to Drive Growth @ Your Firm

Service Line Up

- A. 1:1 Sales and Marketing Coaching
- B. Sales and Marketing Skills Training Workshops
- C. Keynotes and Presentations for Retreats and Conferences
- D. Growth Plan Development and Implementation
- E. Sales and Marketing Recruiting and Integration
- F. Managing Partner Coaching

Please see the following pages for detailed information on each service.



**Even Great Athletes need a Coach
to help them Succeed**

A) 1:1 Sales and Marketing Coaching

>>> “I can’t seem to close.” “My referral network is weak.” “Is my sales approach effective?”

For those partners or managers with potential and desire to contribute more, we offer some 1:1 help, support, and accountability. Together, we’ll build an individual marketing plan with revenue and activity goals.

Then, we’ll have monthly coaching meetings to discuss:

- ◆ Client development/Cross-selling
- ◆ Referral source development
- ◆ New business opportunities/Pursuits and proposals
- ◆ Lost clients/pursuits and lessons learned
- ◆ Personal brand building
- ◆ Realization and pricing
- ◆ And, we’ll set a 30 day action plan

Benefits include significant ROI, rapid results, development of a personal marketing approach, and the measurement/management of performance is easier.

> 1:1 Coaching Successes

1:1 Sales & Marketing Coaching Relationships:

- ✓ Built a CPA firm partner practice from \$700,000 to nearly \$1,200,000 in four years (2009-2014/ongoing)
- ✓ Helped a CPA firm partner achieve annual goals of \$50,000 in year 1, \$75,000 in year 2, and 90,000 in year 3 of coaching
- ✓ Coached a new partner in business development to fuel nearly \$75,000 of practice growth in one year
- ✓ Coached a numerous managers to achieve \$30,000 - \$50,000 of new business in first year marketing efforts



Having the Right Tool for the Job Really Matters

B) Sales/Marketing Skills Training Workshops

>>> **No accountants choose accounting as their career path because they want to market and sell!**

So many firms are asking more people to become involved in the marketing and sales effort, but few participants are ready. Armed with basic skills, explored in a non-threatening manner, more people can contribute effectively to the sales/marketing effort.

Workshop Series Topics:

- ◆ Referral source and COI network development
- ◆ Client retention, and cross-selling
- ◆ Building trust with clients and recognizing clues and triggers
- ◆ Networking and LinkedIn
- ◆ Sales pursuit mastery/Sales process
- ◆ Train the trainer programs
- ◆ Custom topics available

Benefits include stronger teaming on marketing, fewer missed opportunities, better growth engine, and more hands on deck.

> Training Successes

Sales and Marketing Skills Training Successes:

- ✓ Non-partner participants in the program fueled 4% growth (\$250,000) in one year. None had ever contributed to growth in the past.
- ✓ Staff-Manager participants created an growing annual revenue stream of \$200,000 in the first year, growing to \$250,000 in year two, and growing to nearly \$500,000 in year five. None had contributed to growth in the past.
- ✓ Participants from one firm engaged in cross-selling efforts of \$150,000 in one year.
- ✓ Dozens of staff and seniors bringing in their first-ever clients.



Keeping a Pulse on Industry Trends Enables Better Strategic Thinking and Planning

C) Keynotes, Presentations & Workshops

>>> “We’d like to hear from someone with broad industry perspective at our next retreat.”

60-180 minute presentations/workshops on top trends in the marketplace:

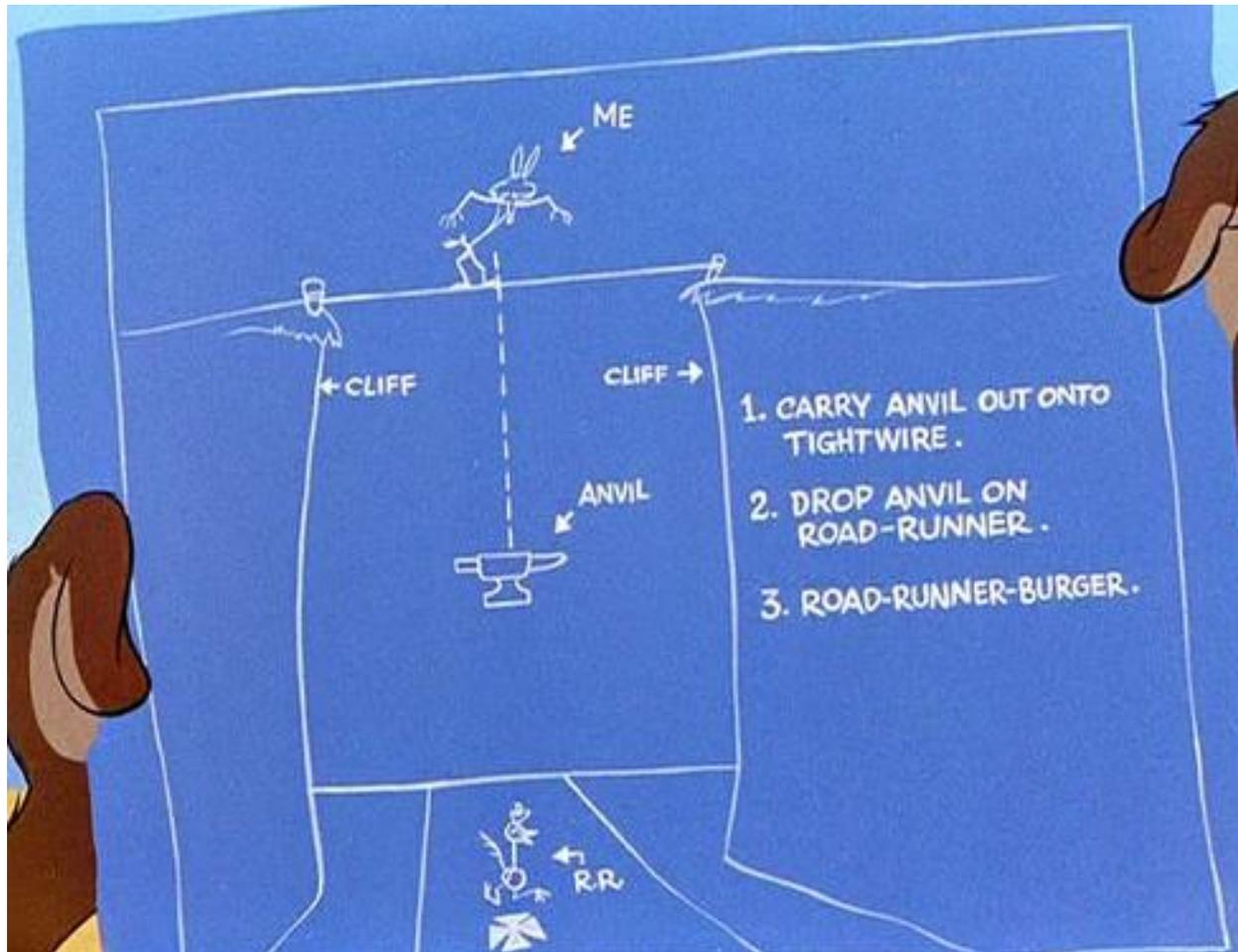
- ◆ Building a Sales and Marketing Culture
- ◆ Ignite Organic and Grass Roots Growth at Your Firm
- ◆ Why Niche Matters Today more than Ever
- ◆ The Changing Partner Job Description
- ◆ Secrets from the Rainmakers
- ◆ Client Retention Strategies that Work
- ◆ The Evolving Marketing Director Role

C) Keynotes, Presentations & Workshops

- ◆ Hiring, Compensating and Integrating your First Business Developer
- ◆ Hiring and Compensating a Marketing Director
- ◆ Building a Winning Pursuit and Proposal Strategy
- ◆ Strategic Revenue Goal Development
- ◆ Coaching your High Potentials to Greater Success
- ◆ Lead Generation Techniques that Work
- ◆ What Drives Growth in Today's Environment
- ◆ Other Presentations Available, Custom Presentations Built Upon Request

> Recent Presentations

- ✓ **DFK International** “Driving your firm Growth via Niches”
- ✓ **AICPA/PCPS/TECH/AAM** “Building a Sales and Marketing Culture @ Your Firm”
- ✓ **Armanino LLP** “Advanced Business Development Strategies”
- ✓ **Peterson Sullivan LLP** “Embracing the new Reality of Niche Marketing”
- ✓ **GALLINA LLP** “Igniting Organic Growth @ Your Firm”
- ✓ **AAA Washington** “Components of a Strong Marketing Culture”
- ✓ **CPA America** “Cross-Selling Strategies that Work”
- ✓ **PrimeGlobal** “Key Ingredients for Growth”
- ✓ **CPAII** “Finding Growth at your Firm”
- ✓ **Anchin** “Client Retention Strategies in Today’s Environment”
- ✓ **LMA Chicago** “Secrets from the Rainmakers”
- ✓ **Accounting Today GroPro Summit** “Top Trends in Marketing & Sales”



Even the Coyote knew the Importance of a Good Plan to (try to) Achieve a Goal

D) Growth Plan Development

>>> “We need a new and comprehensive approach to growth.”

Building a growth plan and giving you a roadmap for success:

- ◆ Marketing audit
- ◆ Revenue goal setting/mapping
- ◆ Budget development
- ◆ Building a growth committee
- ◆ Marketing/sales culture development
- ◆ Client development/cross-selling
- ◆ Client interviews and surveys
- ◆ Niche development
- ◆ Brand enhancement
- ◆ Lead generation
- ◆ Website/e-marketing
- ◆ Social media marketing
- ◆ Pursuits and proposals
- ◆ Seminar/Event programs
- ◆ Referral source development
- ◆ Media/PR plans

Benefits include a path to success, expert help in every step along the path, greater accountability, all cylinders firing, greater results, and a more directed/deliberate effort.

> Growth Plan Success

Recent Growth Plan Successes:

- ✓ A growth plan plus outsourced marketing director relationship driving and fueling nearly \$1M in new revenue in the first year. This represented a 25% growth rate before attrition.
- ✓ A growth plan plus outsourced marketing director relationship driving a total of nearly 8% growth in the first year.
- ✓ A niche plan and implementation assistance driving \$150,000 in new business in the first year (a 15% growth rate)
- ✓ Numerous pursuit and proposal engagements generating wins of \$50,000+ that were directly attributable to the process.



**Do you have the Right People at your Firm
to Drive Growth?**

E) Recruiting Sales and Marketing Talent

A firm's first business development director or marketing director can be a huge win **or a huge disaster**. Let us help you avoid the disaster by helping you craft a winning job description based on your needs, educate your partners on what they can and can't expect from this person, leverage our network to find you the perfect candidate, and follow-up with coaching to ensure a smooth integration.

- ◆ Your firms' first Business Development Executive
- ◆ Chief Growth Officer/Chief Marketing Officer
- ◆ Marketing Director
- ◆ Senior Marketing Manager/Practice or Niche Specialist

Benefits include a higher chance of long term success, lower risk of making a bad hire, faster results than doing it on your own.

> Recent Placements

Recent Placements:

- ✓ Recruited the first business development director for a 100 person firm.
- ✓ Recruited first strategic marketing director for a 100 person firm.
- ✓ Recruited first business development director for a 225 person firm.
- ✓ Recruited first strategic marketing director for a 75 person firm.
- ✓ Recruited first marketing professional for a 50 person firm.



**Advice and Counsel from a Coach often
Enhances the Result**

F) Managing Partner & Marketing Director Coaching

>>> “Where do I start?” “What does the path look like?” “What can I expect for growth?” “How much should we be spending?” “What do other firms do?”

Many managing partners find themselves with responsibility for marketing, sales, and growth yet are unsure about how to best drive these functions. And, some marketing directors find their firm needs exceeding their abilities. 1:1 coaching is available on:

- ◆ Infrastructure development
- ◆ Skill-sets and responsibilities of key players for your growth equation
- ◆ Budget and spending
- ◆ Results and ROI
- ◆ Compensation and rewards
- ◆ Goal setting/strategic revenue mapping
- ◆ Strategies and actions

Benefits include an external perspective, fewer mistakes, faster results, and a trusted and proven approach to common situations.

> Coaching Successes

Coaching Success:

- ✓ Highly confidential!



Why Kuesel Consulting is your Best Choice

Value Propositions

Kuesel Consulting:

- ✓ Bring Industry Perspective Gained from “Both Sides of the Desk”
- ✓ Straight Talk
- ✓ Collaborate *WITH* You
- ✓ Leverage 15 Years of Industry Experience
- ✓ Build Customized Solutions Based on Detailed Understanding of your Needs
- ✓ Be Proactive, Attentive, Responsive
- ✓ Offer high ROI and a Value Driven Approach
- ✓ Be Efficient and Effective
- ✓ Be Fun and Engaging
- ✓ Make you Look Good

Will other Consultants Deliver?

?
?
?
?
?
?
?
?
?



Art Kuesel, President

EXPERIENCE

Sales Executive

3 years at \$60M CPA firm

5 years at \$25M CPA firm

6 years at PDI/Koltin Consulting

1 year at Kuesel Consulting

EXPERTISE

Sales Coaching

Sales and Marketing Training

Keynotes, Presentations,

Workshops

Growth Plan Development

Managing Partner Coaching

Sales & Marketing Recruiting

STREET CRED

In-house and external experience

Worked with dozens of Top 250

Firms including a third of the Top 100

Accomplished writer and blogger for

Accounting Today

Accomplished speaker and presenter

on hot industry topics

AAM Board of Directors

PASSIONS

Food and Wine Centric Travel

Gourmet Cooking, BBQ

Animals

Beaches

Contact

Art Kuesel, President

Kuesel Consulting, Inc.

312.208.8774 or art@kueselconsulting.com

Subscribe to my Blog at:

www.kueselconsulting.com



And now for the good stuff! My favorite recipes...

Pan Roasted Rib Eye

Recipe Courtesy Bon Appetit

1 @ 2-inch-2 1/4-inch-thick bone-in beef rib eye (about 2-2 1/2 pounds), preferably dry-aged, at room temperature for 1 hour

2 teaspoons kosher salt

4 tablespoons grapeseed or vegetable oil, divided

3 tablespoons unsalted butter

1 garlic clove, lightly crushed

4 sprigs thyme

1 sprig rosemary

Flaky or coarse sea salt



Chef Kuesel's Adjustments Indicated with *

Preheat oven to 400F. Set a wire rack inside a large rimmed baking sheet. *Season steak Char-Crust Hickory meat rub pressing onto all sides of meat and adding more spice rub by the teaspoonful if needed to coat entire surface.

Heat 2 tablespoons oil in a large cast-iron or other ovenproof skillet over high heat. When oil begins to shimmer, place steak in skillet (be sure to have fan on high; the rub creates some smoke). Sear steak for 1 minute (any longer and the rub will start to burn). Transfer steak to a plate and carefully drain fat from skillet.

Wipe skillet clean with a paper towel. Heat remaining 2 tablespoons oil in skillet and sear other side of steak for 1 minute. Add butter, garlic, and herbs to skillet; cook until butter is foamy. Carefully tip skillet and, using a large spoon, baste steak repeatedly with butter for 1 minute. Turn steak and baste other side for 1 minute.

Pile herbs on top of steak, transfer skillet to oven, and roast until an instant-read thermometer inserted horizontally into center of meat registers 125° for medium, 15-17 minutes. *Watch the time – this calls for a 2 inch steak!

Transfer steak to prepared rack; let rest for 20 minutes. Cut steak from bone, slice, and sprinkle with sea salt.

*Enjoy with a Mounts Family Grenache

Perfect Guacamole

Recipe Courtesy Nordstrom "Entertaining at Home"



Chef Kuesel's Adjustments Indicated with *

6 Avocados

1 tomato, cored and chopped

1/3 cup red onion minced

*3 cloves garlic minced

¼ Jalapeno pepper, seeded de-ribbed, finely minced

*¼ Serrano pepper, seeded, de-ribbed, finely minced

2 Tablespoons fresh lime juice

2 Tablespoons chopped cilantro

¼ Cup sour cream

*1 Tablespoon Smoked Tabasco

*1/3 small can of smoked chipotle peppers in adobo sauce to give it a smoky richness.

Kosher salt and Black Pepper to taste

*Enjoy with a Kim Crawford Sauvignon Blanc

Balthazar's Braised Short Ribs

Recipe Courtesy Balthazar Cookbook

There is nothing better than making these short ribs on a cold winter day!

I enjoy preparing some extra baby carrots or cipolini onions and simmering them in the reduced sauce for 20 minutes just before serving. Pair with polenta, sautéed spinach, or roasted fingerling potatoes.

6 short rib of beef (5 to 7 pounds)
2 sprigs rosemary
6 sprigs thyme
1 bay leaf
1 stalk celery, halved
3 teaspoons kosher salt
2 teaspoons fresh coarse ground black pepper
3 tablespoons vegetable oil
3 medium carrots, peeled and cut into 1-inch pieces
1 medium onion, roughly chopped
4 shallots, peeled and sliced 1/4 inch thick
5 garlic cloves, peeled and halved
3 tablespoons tomato paste
3 tablespoons all-purpose flour
1/2 cup ruby port
4 cups full-bodied wine, such as cabernet sauvignon
6 cups veal stock (veal stock is really best but you can substitute good homemade beef stock)

*Chef Kuesel's Adjustments Indicated with **

Preheat the oven to 325F. Bind each rib with cotton kitchen twine. Place the rosemary, thyme, and bay leaf between the two celery halves and bind with kitchen twine.

Season the short ribs with 2 teaspoons of the salt and the pepper. Heat the oil in a large Dutch oven over a high flame until it smokes. In two batches, brown the short ribs well on both sides, about 3 minutes per side, pouring off all but 3 tablespoons of oil between batches. Remove the ribs and set aside when done.

Lower the flame to medium, and add the carrots, onion, shallots, and garlic to the pot and sauté for 5 minutes, until the onion is soft and light brown. Stir in the tomato paste and cook for 2 minutes.

Add the flour and stir well to combine. Add the port, red wine, and the celery-herb bundle.

Raise the flame to high and cook until the liquid is reduced by a third, about 20 minutes.

Return the ribs to the pot (they will stack into two layers).

Add the stock and the remaining 1 teaspoon of salt; if the stock doesn't cover the ribs by at least 1 inch, add water up to that level.

Bring to a gentle simmer, cover, transfer to the preheated oven, and cook for 3 hours. Visit the pot occasionally and stir the ribs, bringing the ones on the bottom up to the top -- they're done when the meat is fork tender and falling off the bone.

Transfer the ribs to a large platter and remove the strings.

Skim any fat from the surface of the sauce, and then strain through a sieve into a medium saucepan. Discard the solids.

Over medium heat, bring the sauce to a strong simmer and reduce the liquid until slightly less than half (4 cups) remains, about 1 hour.

Return the ribs to the pot, simmer for 10 minutes to reheat, and serve.

*Enjoy with a Varozza Cabernet.

Sautéed Shishito Peppers



Heat olive oil and garlic in a pan, add peppers, sauté for a few minutes until the peppers start to soften and brown. Salt and pepper to taste.

Smoked Maldon Sea Salt is a real treat on these peppers!