

Nuts and Bolts of Tactical DEI

Hint: Be Mindful of Inclusive Efforts in External Marketing

Richard Shippee

The affirmative use of diversity, equity and inclusion tactics by CPA firm marketing departments has evolved to such an extent it is now rare to see marketing efforts not reflect a firm's commitment to equal opportunity.

Here is how three firms have creatively incorporated ethnicity, gender and age in their strategy to support and promote their firms.

Withum Culture Video

Withum's culture videos are legendary marketing strategies in the accounting industry. The campaign, blessed by

Withum CEO Bill Hageman, who issued a "give it a try" edict, is now in year 10.

"From theme conception and coordination, to execution and final release, this effort is the responsibility of the marketing department," said Rhonda Maraziti, Withum's chief marketing officer. "We are very intentional about ensuring the filmography accurately reflects the demographics of our team members in terms of gender, race, age and dress. We even consider geography, so all offices in every region are represented."

Available on the Withum website, the videos provide an insider's view of the firm intended to project the very real sense of a multi-racial, multi-ethnic, multi-cultural corporate family. A diversity effort of this size didn't happen overnight, it evolved.

The lesson, though, may be to start small but think big.

Fabric of the Firm

EisnerAmper's strategy is to deploy marketing techniques to reflect the marketplace.

"Women and minorities are a vital part of our market engagement strategy across all sectors, including traditionally male-dominated industries like financial services and real estate," said Mike Mattia, EisnerAmper's marketing partner in charge.

Kristen Lewis, EisnerAmper's marketing director, echoes that sentiment.

"When planning conferences for an example, we aim to build inclusive panels from the perspective of gender and minority representation," Lewis said. "We also look at demographics for geographic mix, levels of experience and subject matter specialization to add a broader audience appeal."

EisnerAmper internalizes this strategy in its Rising Stars training program for presenters and speakers. Rising Stars are the next generation of firm leaders who are younger and from more diverse within the firm and will become its ambassadors for years to come.

The firm's marketing department has always played a role in bringing DEI programming to the marketplace. Its decade-long Women of EisnerAmper program, as well as its networking and job placement effort, Friends of the Firm, are initiatives led by the firm's marketing efforts. While both affinity groups started out with



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internal-facing activities, they have become external programs promoting the firm's commitment to inclusion by sponsoring client-facing events seeking to attract clients, prospects and friends to attend networking and business-related events.

EisnerAmper's recent expansion into South Florida also has made it more diverse and inclusive in terms of language and culture, as it now engages a more heavily Hispanic influenced population and marketplace.

The firm's marketing team in Miami finds it important to use "the language of local business" to engage its growing network of Spanish-speaking clients, prospects and referral sources. Marketing materials are written in Spanish and Hispanic voices are included in conference planning and presentations. Similar tactics and strategies are now being employed in geographic markets where other cultures have a strong presence, including the Asian and Russian communities.

Branding & Rebranding

There are few marketing-driven projects better suited to embracing a diversity and inclusion model than a branding or re-branding campaign.

That's what happened at Marks Paneth.

Diane Paoletta, Marks Paneth's chief marketing officer who was the initiating and driving force behind the branding effort there said the firm decided its branding program, "Success Is Personal," would concentrate on the needs of its clients. The clearest example is the firm's advertising program.

"We created ads that profile our clients, reflecting our clients' diversity and making them the subject of our efforts," Paoletta said. "This broadly diverse clientele appreciates having advisors who come from similar backgrounds and share their

perspectives. Every word of copy and every image is purposeful."

A powerful example of this is its ad featuring a minority female CEO who says, "I can describe my accountant in three words. She gets it." Another is its law firm ad featuring a female lawyer who talks about how she and her accountant act as a team.



"As the number of female professionals continues to increase and as senior leadership in companies becomes increasingly diverse, it is important that we speak to their needs and concerns," Paoletta said. "Our ad campaign was designed to reflect these developments."

Marketing is the Driver

Marketing departments often deal with service providers such as ad agencies, creative boutiques, media buyers and conference organizers. This buying power is a potent tool when it comes to ensuring the firm's corporate image reflects a commitment to diversity and racial inclusion.

For example, Maraziti said the firm works closely with conference organizers and insists panels include at least one woman.

She points out the insistence on female and minority representation is in large part a statement in support of the firm's client and employee base, which is more and more diverse. This mindful discipline over speaker slot assignments prevents a homogenous lineup of participants — even if unintentional.

Marketing also has a role to play when it influences other actions and activities of the firm including hiring, sales training, recruiting and affinity groups. As one of four leadership team members of the "Women of Withum," Maraziti is joined by the chief talent officer and two female partners to, as she says, "advance the mission to create opportunities which motivate, elevate and advocate for our female professionals by empowering them with the tools they need to succeed."

Withum's marketing department does all the messaging for their affinity groups and deploys their budgets as well.

Enlightened Self Interest

What's better than doing well by doing good? These firms have seen the need for and the benefits of investing their skills, time and resources into marketing initiatives that reflect the cultural realities found in their client base, employee groups and their own communities.

What steps might you take to advance the perception your firm is blind to race and ethnicity, is gender inclusive and welcoming of participants regardless of age, creed or nationality? It's a big task but one worth taking on for the long run.

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