Public relations guide for CPAs

American Institute of Certified Public Accountants

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PUBLIC RELATIONS GUIDE FOR CPAs
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Public relations (PR) is the communications process which strives to foster an audience's understanding about and acceptance of a person, organization or issue. It can be used to meet various objectives, such as shaping public attitudes on important topics or helping businesses grow. More importantly, public relations can help you accomplish the specific goals of your firm in terms of presenting an image, increasing visibility and generating business.

As a communications process, public relations involves a wide range of activities. You may choose to work with the local press, place advertisements in community journals, send direct mail packages to small businesses in your town, host a special event for community leaders, or publish a client newsletter.

Public relations provides you with the freedom to select the strategies that are consistent with your expertise, budget and goals. Decide carefully which of the various PR activities you want to include in your PR plan to help ensure that you communicate your message to specific audiences in the most meaningful way.

This handbook presents various types of public relations strategies, explains how to implement them successfully and efficiently, and discusses measuring their effectiveness in achieving your goals.
Public relations provides a cost-effective way for CPAs to accomplish two primary objectives:

1. **Redefine the role of CPAs in the community.** As a CPA, you are qualified to inform the media, business leaders, government officials, and community residents on a wide range of subjects such as taxes, personal financial planning, business management, and auditing procedures. Positioning your firm or yourself as an adviser or consultant helps strengthen the perception of CPAs as more than just tax-return preparers.

2. **Increase one's client base.** Capitalizing on an "expert" image, assertive public relations efforts can translate into incremental business growth. It's important that not only are you a highly qualified CPA, but also that prospective clients know about it. Additionally, you can promote to current and new customers the other services you offer.

The AICPA and state societies plan public relations strategies to increase public awareness of the diverse roles CPAs play and the different services they offer to individuals and businesses. The underlying objective is to enhance the CPA's image as a vital player in every aspect of business and finance. To achieve this objective, particularly on a local level, participation of the media is essential. Each year, the AICPA responds to hundreds of inquiries from the media and places news and feature stories in major newspapers and magazines, as well as on radio and television stations around the country.

For example, a major AICPA program to support the public relations efforts of state societies and individual CPAs is the weekly newspaper column *Money Management*. The column appears under a state society byline in more than 1,300 newspapers nationwide and has an estimated readership of over 23 million people. Providing ideas and advice on all areas of personal finance, including financial planning, establishing credit and tax strategies, *Money Management* may be the most widely circulated newspaper column of its kind. The column series was honored with the 1990 Gold Quill Award from the International Association of Business Communicators.
The *Public Relations Guide for CPAs* is intended to provide some suggestions and basic guidance for your public relations efforts, especially if you are new to this area. *AICPA members who have ideas or concerns about communications activities not covered in this handbook are encouraged to contact the Institute’s Communications Division for assistance.*

A variety of AICPA materials is available for use by state societies and CPAs, including speeches, slide presentations, handouts, and brochures (see “AICPA Materials”). Some materials are designed for general audiences, while others are more appropriate for the business community. A list of reference sources on pages 43–46 will also be useful to you should you want additional information or help with fine-tuning your public relations campaigns.

The PR activities of the AICPA and state societies pave the way for your individual public relations efforts. For optimum effectiveness, maximize the opportunities available through your state society and the AICPA in conjunction with your own public relations work.
Public Relations for Better Business

Organization and planning are the keys to effective public relations. These general guidelines will help you develop a successful public relations program.

First, establish objectives. That means answering questions such as: What do I want from my public relations effort? Am I focusing on image enhancement, business development or both? Do I want to change—or create—public opinion? What are my target markets—which is primary, secondary, tertiary?

For example, if your objective is to reach new clients in a particular industry, then your primary target market is companies or individuals working in that industry. Secondary markets may be those working in related fields and your third target market may be outside service providers to those businesses or individuals.

Second, do market research to assess public opinion and to help formulate your PR plan. The better the research, the more focused your PR tactics will be. Research should help you to determine what your target audiences believe about a situation as well as discover what they watch or read, what they would respond to, how they can best be found, and whether there are any formalized outlets which already exist (i.e. industry newsletter, annual convention) that you can utilize.

Market research could involve calling colleagues, or watching news programs and reading the local papers for topic
ideas, or reviewing published surveys. Libraries provide a wealth of information gathered by researchers. PR and ad agencies may also be helpful as they often sponsor focus groups or distribute questionnaires to assess public opinion.

Third, determine the best course(s) of action and develop a plan. Perhaps a news release to the local media publicizing a speech you will give to your town's Board of Education is enough. Maybe you'd like to place a bylined article on the same topic in the local paper, too. Keep in mind that a mix of activities will increase the reach and effectiveness of your public relations effort. State the results you expect to achieve and determine the methods you'll use to measure them.

Last but not least, develop a timetable and budget. (If several people are working with you on a project, include a responsibility checklist as well.) Give yourself sufficient advance notice to prepare all the elements of your program — and make sure your timing is consistent with the deadlines of the media, community organization, government office, etc. Allocate the money you'll need for stationery, postage, envelopes, phone calls, transportation, promotional items, and other expenses. Explained in the next section are various public relations strategies with "how to" guidelines and methods for evaluating their effectiveness. And remember, you could always hire a public relations agency or practitioner if you prefer. Check with a public relations trade association, the Yellow Pages or with acquaintances who could refer a PR professional.

**PUBLIC RELATIONS STRATEGIES**

The main types of public relations strategies are media relations, community relations, special events, advertising, and direct mail. Media relations basically means communicating with the print or broadcast media on specific issues in an effort to generate favorable news coverage. Community relations increases your visibility and enhances your image on a local or national level as well as with targeted audiences. Special events afford wide exposure and promote goodwill among targeted groups. Advertising involves paying for a particular message to appear in specific media. Direct mail solicits business from prospective clients via mailings. Each of these strategies will be discussed in more detail.
MEDIA RELATIONS

Media relations can take many forms. It may involve distributing a press release or a public service announcement, giving interviews or pitching a bylined article.

Press Release (or News Release)

A press release is the method used to attract the media’s attention to what you believe is a newsworthy story. Therefore, the press release should be written as much like an actual news story as possible, answering the basic questions: Who? What? When? Where? and Why? The beginning of the release, or lead, is key and must contain the substantive elements of the story. Otherwise, an editor will not read any further. Remember, press releases are used to get the editor’s or reporter’s attention, so don’t expect to see your release reprinted verbatim in the paper. (See press release below for style and format guidelines.)

Sample Press Release

FOR IMMEDIATE RELEASE

CONTACT: (name)
(phone number)

LOCAL CPA APPOINTED TO AICPA COMMITTEE

CITY, STATE, DATE—______ (name) ____ , a CPA from ______ (town) , has been reappointed to the American Institute of Certified Public Accountants (AICPA) Tax Forms Subcommittee. This subcommittee reviews federal tax forms, instructions and publications and submits to the Internal Revenue Service recommendations for simplification and revision where necessary.

__________________________ is a partner in the CPA firm of _____________________.

He has been a member of the Financial Statement Review Committee of the (State) Society of CPAs for six years.

The AICPA is the national professional association of CPAs with more than 300,000 members in public practice, industry, government, and education. In its continuing effort to serve the public interest, the organization sets audit standards, upholds the profession’s code of conduct, provides continuing professional education, implements peer review and quality review programs, and prepares and grades the Uniform CPA Examination.

#    #    #
A release should be approximately one to two pages, double spaced with indented paragraphs on 8-1/2” x 11” paper. In the upper right hand corner put the name and phone number of the person responding to reporters’ questions (i.e., the “contact”). In addition, state a timing for the release of the information (i.e., For Immediate Release) and provide the city, state and date the release is sent. The release should end with a paragraph providing background information on you or your firm. This final paragraph should be the same in every release you issue.

Thousands of releases hit an editor’s desk every day. To help make yours more noticeable, consider developing a special masthead with your logo and using one or two colors to attract attention. This stationery does not need to be expensive—just visually appealing and eye-catching.

After your first release is written, develop a media list. (Media lists are very important to a release’s effectiveness.) Once established, media lists become the “standard” distribution for all your releases. Because of considerable turnover among journalists in the ever-changing field of publishing, you should update your media lists at least once a year. Using a media directory (see “Reference Sources”), list each outlet and corresponding editor’s name/title to receive the release. Be sure to consider media outlets in different fields/industries which may be interested in your news. For example, a release announcing a new associate appointed to your firm to specialize in local tax issues may be appropriate to send to tax, financial planning and real estate trade publications as well as to the local papers.

The timing of your press release is critical, too. Reporters usually work on tight deadlines—especially for the dailies. In any case, always be aware of scheduling constraints.

For example, a weekly paper may “close” a week in advance, so your news won’t get in if you send a release two days before the publishing date. To avoid missing deadlines, call the outlet (broadcast or print) in advance to confirm the editor’s name, correct title, address, and due date/time for releases. Once the media list is complete, mail original copies of your release. It is acceptable to call the media a few days later to see if and when your story will run. For print media, arrange to get advance or extra copies. For a radio or television interview, contact a transcription service (see page 25).

If it seems your news never gets published or broadcast, rethink what you believe to be news. A new hire or a promotion is
news, a staff meeting isn't. A special event featuring a community leader is news, a firm party isn't. Also, review your release for “interest” value. Press releases should appeal to an editor's readers, viewers or listeners—not just to the people writing the release. Present the news so that it's of interest to the audience (e.g., helps, warns or otherwise affects them).

Public Service Announcements

You probably have heard or seen public service announcements (PSAs) on local radio or TV stations. PSAs are short spots publicizing an event, program or news pertaining to a nonprofit organization or presenting information for the public good. It is, essentially, free advertising. However, PSAs must present information or ideas clearly beneficial to the listening or viewing audience.

PSAs should be written in “ready for broadcast” style for 15-second, 30-second or 60-second spots. If you prefer to send your own tape, call the station first to find out if it will accept it and what format the station requires. An example of a PSA follows:

“Here's a tax update from _______, a local certified public accountant.

“Starting in 1990, if you buy EE Savings Bonds in your own name and redeem them in a year when you’re paying for your child’s college tuition, you won’t pay tax on the accumulated interest. But there’s a catch. The tax break is phased out for high-income taxpayers.”

INTERVIEWS WITH THE MEDIA

Interview requests from the media may occur in one of two ways: they contact you once you have established yourself as accessible to them, or you generate requests through assertive public relations. Ideally, both types of public relations, reactive and proactive, should work together on an ongoing basis. The section below focuses on ways to secure interview requests from the media.

Pitching

A “pitch” is the term for “selling” a story, person, idea, or article to the media. Offering an “expert” to be interviewed on a topic or submitting a bylined article, for example, are two types of pitches to the media.
The pitch letter (see example below) presents the situation analysis, lists the questions which arise and explains how you (or your firm) are able to answer those questions.

Sample Pitch Letter

Date
Editor's/Reporter's Name
Title
Name of Publication/Station
Street Address
City, State Zip Code
Dear (name):

Try to run a business the way our federal government does and see how long it takes before it falls down around your ears. Our government has more than 200 different accounting systems and no one person accountable for its financial affairs. So it is not surprising that:

- The Defense Department can't account for over $600 million in advances made by foreign customers for weapons purchases.
- An independent audit disclosed a $4.2 billion loss within FHA that was five times greater than the government had reported.
- The Interior Department lost between $17 and $19 million in funds it holds for the nation's Indians through massive mismanagement of the $1.7 billion federal Indian Trust Fund.
- And the list goes on . . .

But beneath these scandals is the bigger and more important story that the federal government has no effective financial standards and controls, doesn't really know what it owes or to whom, and cannot really account for how it spends the tax money we pay annually to support it.

Though this situation affects us all, few are aware of how widespread the damage or how great the cost. For over two years, the American Institute of Certified Public Accountants (AICPA) task force on improving federal financial management has been studying the problem and ways to improve it.

Members of the task force are available for interviews and to provide background for a story on this important subject—from tricks used to underreport the deficit, to the more stunning examples of fiscal folly, to illustrations on how an unworkable system is eating up taxpayer money. I can also provide you with a bylined article on the staggering cost of the government's poor financial management practices, if you prefer.

To discuss this story idea, or to schedule an interview, call me at _________. I'll be in touch with you in a few days to follow up.

Sincerely,

Your name
Title
Begin the letter (addressed correctly to the appropriate editor or producer) with an intriguing opening sentence. The pitch letter's tone does not need to be as straightforward and passionless as a news release's. Then discuss public opinions, trends, relevant comparisons, published facts, and any other information you think is helpful in presenting your case and supporting the pitch. List the questions or concerns you plan to address and offer the interview, bylined article or story idea. Close the letter by stating that you will call in a few days to discuss the possibility of meeting, or appearing on the television or radio show.

You will increase your chances for television placements if you also outline the visuals you can offer (e.g. glimpse of a benefit dinner or interview of a couple retiring financially secure because of their CPA's advice).

Again, prepare a media list which includes media outlets in all the various industries that might find your news/opinions valuable. Then send the pitch letter to each outlet and wait a few days before calling to follow up on the letter.

Also, be ready to provide background or supporting information to the reporter or editor. Prepare a bio on yourself (or the spokesperson) and a fact sheet on your firm, as well as a listing of any statistics or articles that substantiate your story. The spokesperson's photograph and resume should be included with the bio or fact sheet.

The key to successful pitching is to KEEP CALLING! While information is the basic ingredient in getting placements, you can also suggest having a casual lunch to discuss background, or general, information on the topic. Don't take the first "no" for a final answer. Your subject of the moment may just not be what that particular reporter is interested in at the time. If it seems impossible to get the placement, consider the value in getting your name out there. Reporters will keep correspondence in their files and may call when they need your expertise in the future.

COMMUNITY RELATIONS

Community relations provides a good opportunity to achieve recognition of your talents and simultaneously enhance the reputation of the CPA profession. Participation in educational, civic, professional, and philanthropic organizations will enable
you to provide valuable public service support and also increase your visibility.

You can turn this visibility into business. If you’re speaking on behalf of an organization sponsoring a seminar on tax return assistance, circulate your business card and offer a free consultation to everyone who attends the seminar. If a prospective customer enjoys the consultation, he or she may become a client. Also, ask guests to sign an attendance sheet and use it to generate mailing lists for “sales” letters or invitations to future events.

State CPA societies can be particularly helpful in community relations. They are involved in many activities such as:

- Income tax return assistance for low income groups;
- Seminars on financial management for nonprofit organizations; and
- Workshops to help small business owners organize and analyze basic accounting information.

Other ideas include offering a weekly—or daily—advice column in a local newspaper. Your name, address, phone number, and bio should appear at the bottom. (See section on “Pitching” for how to offer story ideas.) Host a special event (see section on “Special Events”) and distribute promotional literature, display signs with your logo or hand out interesting giveaway items.

Consider these opportunities as well. Become a volunteer with an organization which may help generate business or provide contacts; join appropriate trade or professional organizations; become a philanthropist and attend benefits where you’ll meet business leaders; or sponsor an award or scholarship program for a local high school student. Consult your state society, business or civic organizations and local papers for possible community organizations or events with which to be involved. Make it known that you plan to be an active participant.

When carefully and thoughtfully implemented, community relations can be one of the most effective public relations strategies. Nothing substitutes for “word of mouth” referrals and recommendations, or face-to-face presentations.
SPECIAL EVENTS

Special events, orchestrated properly, can help get your name and your firm’s name in the news. Special events can include:

- A celebration such as your firm’s 25th anniversary;
- The opening of a new office;
- An award presentation for public service;
- An annual program such as a scholarship award to a high school senior planning to study accounting;
- Sponsorship of a community event or benefit with proceeds going to a local charity; or
- A speech by a local celebrity or other noted personality.

Special events require strong organization and planning skills with strict attention to detail. Recruit help (associates, family or event management firm) quickly and allocate a realistic budget.

Planning the Event

There are many things to consider when planning a special event. Besides the basic elements, Who? What? When? Where? and Why?, you must take into account “outside” variables such as climate, day of week, time of day, season, and travel and lodging arrangements, to name a few.

Here are the basic questions which must first be answered to stage a successful special event:

Who will attend?  
Who will speak?  
Who will entertain?  
Who will sponsor and who will benefit?  
Who from the media should be invited?  

What is the purpose of the event?  
What should the event be?  
What is the format (i.e. a cocktail hour)?  
What can you do to promote it?  
What can you do to assure good media coverage?  
What will the entertainment be?  

When should the event be held?  
When would the media be most likely to cover it?
WHEN should you invite speakers, entertainers, media, or other hosts?
WHEN should you begin promoting the event?
WHERE should the event take place?
WHERE are the nearest airports, hotels, limousine services, restaurants?
WHY am I sponsoring this event?
WHY should the media come?

By considering all of the above factors, you are more likely to plan a successful special event. For example, if you are hosting the event primarily for local media exposure but schedule it for the same night as the mayor’s speech to business leaders, you’ll be out of luck. And if having certain speakers/entertainers is important, check their availability before setting a date.

Generally, Monday and Friday nights are the least desirable and most unlikely to draw media coverage. Finally, never rule out the unexpected. Even if every reporter and correspondent in town has promised to attend, a more spectacular news story (especially fires, crimes or political announcements) can upstage you. Chalk it up to PR reality and schedule another event. Also, keep in mind that not all special events need to have media coverage as an objective — and not all events are appropriate for the media to attend.

Because the planning stage is so crucial, allow at least three months’ preparation time. This time is necessary because it’ll take a month just to develop and print invitations which should be mailed at least six weeks before the event. During this time, you will also have to secure the place and caterer, sign contracts, give deposits, formalize the program, allow time for speeches to be written, prepare an audiovisual presentation, send out a press release and make follow-up calls, produce directional or promotional signs, make necessary travel and lodging reservations, etc. And don’t forget to reconfirm every single detail three days in advance!

Details, Details

The vital importance of paying attention to details cannot be emphasized enough. Imagine these woeful circumstances: there are only enough chairs to seat half your guests at dinner; the conference room you booked can’t accommodate all your guests;
the audiovisual equipment you ordered isn't appropriate for the size of the room; there are no napkins at the picnic.

Here are some tips. Check any special equipment early on the day of the event to make sure everything is in good working order. Ask yourself: Is the screen big enough? Is the sound system loud enough? Are there markers for the flip-chart presentation? Are there enough chairs and are the tables properly numbered? Is the lighting adequate?

When these details go wrong, it is painfully obvious to the guests, media, and hosts and can turn a well-intentioned event into a very unhappy occasion. Consider hiring a PR agency or event management firm to coordinate the event or to serve as a consultant.

Securing Media Coverage

News releases announcing an event and inviting the media should be sent out a month before the event. If the event is not in a well-known location, include travel directions.

A week before the event, send a "media alert" to the editors who received the initial release. The media alert follows a simple format:

HEADLINE
Purpose:
Speakers or Program:
Where:
When:
Photo/Interview Opportunities:

The day before the event, call the media to see who is planning to attend. For television media, let them know what visuals you can offer (e.g., a celebrity interview, famous grand ballroom, noted guests arriving). If an interview with one of the speakers/guests is requested, set it up in advance and make sure it happens. (Notify the person to be interviewed to confirm availability and the topic to be discussed.) If a particular reporter or editor is unable to attend, offer to send a post-publicity release.

Set up a "Press Table" and have all media sign an attendance sheet. This will help you develop contacts and track potential publicity.
Press Kit

A press kit should be available at the event and mailed to the media who did not attend. The kit should be a simple folder which includes the following items:

- A copy of the press release;
- A fact sheet on the history of the event, or a backgrounder on you or your firm;
- Photographs and biographies of the speakers/celebrities;
- Copies of the speeches/comments; and possibly
- A small souvenir with your logo.

Another option for post-event publicity is the photo release. During the event, arrange for photographs to be taken of VIPs together, award recipients at the podium, or other interesting situation at the event.

Choose the best picture—check facial expressions, lighting, background—and print enough copies for all media outlets which use photos. Produce 5” x 7” black and white glossy prints; magazines might also use color shots.

Write a *brief* caption describing what is happening in the photo. Identify people by “left, right, center, second row,” etc. The caption should be typed on a separate sheet of paper and taped to the back of the photograph so that the caption is visible beneath the picture. Put the contact’s name, address and phone number on the back of the photo or below the caption. Here’s an example:

**PHOTO**

John Doe (center), a senior at Anytown High Shool, receives the “Outstanding Future CPA” award from chairman D (left) and president E of XYZ Accountants. The local public accounting firm sponsored the award and an accompanying $5,000 college scholarship. The event was held on May 23 at the Any Hotel.

*For more information, contact:*

Your name
Address/firm
Phone Number
After the Event

When your event is over, compile the press sign-in sheets and guest attendance book. Also, write down what worked well and what didn’t so you will remember for future events. Send thank-you notes to the speakers, service providers, other hosts, and, if it was a benefit, to attendees or corporate guests. You should also send notes to the reporters who gave you good coverage. Post-event contact will help strengthen your media relationships and give you another chance to make a pitch.

“The Best Laid Plans. . .”

Murphy’s Law is an event planner’s worst nightmare. No matter how organized and detail-oriented you were, the speaker’s plane may be delayed, the chef could be in a car accident or there might be a blackout.

Just remember to stay calm so you can think logically. Be resourceful and remedy the situation as best you can as quickly as possible. Don’t panic or let the problem become the event. Apologize to the guests for the inconvenience and keep a sense of humor, no matter how difficult it may be.

ADVERTISING/DIRECT MAIL

Advertising

Because advertising is paid space as opposed to free editorial coverage, the advertiser completely controls the ad in terms of its message, distribution and frequency. That’s advertising’s advantage. Its disadvantage is that all this control makes it only a semi-credible communication.

However, advertising as an element of a comprehensive public relations program enhances the overall effort. The ad ensures that the message you’ve decided to communicate gets to whom you want as often as you like. Your public relations activities will set up credibility for the ad, enhancing its effectiveness.

Public relations and advertising work best together when the public relations comes first. For example, send out a news release or pitch letter before running an ad. Once an ad runs, reporters won’t have a “scoop” or see the need to repeat the story. Additionally, it’s this third party (editorial) endorsement which sets up credibility for the ad.
So, if your firm is hosting a personal financial planning seminar, send out the press release first. The release should focus on the information people will gain by attending the seminar. After the news is disseminated to the public, place ads promoting the seminar. The ad’s theme would be: “Don’t miss this opportunity to gain insightful information on personal financial planning.”

There are many vehicles for placing ads, such as local newspapers, local radio stations and cable television channels, and journals of community organizations. Media kits from the advertising departments of television stations, cable channels or publications will provide you with much of the demographic and background information you’ll want before deciding to place an ad.

When placing ads, get specific artwork, format or time requirements and determine as soon as possible the deadline for a particular issue or time slot. For print ads, ask in advance for the cost of black and white or color (1, 2, 3, or 4 color) ads as well as prices of different-sized media space. A ¼-page ad costs less than ½-page, but not necessarily half the price. Similarly, a 15-second television or radio commercial costs less than a 30-second one. You may also be offered discounts for multi-insertion commitments. Be aware that advertising can become expensive.

You’ll need to repeat an ad a few times for it to have any impact at all, especially if it’s an “image” ad. Frequency is an important factor in advertising. A one-time ad is practically worthless, even if it is issues-oriented.

Direct Mail

Believe it or not, all that mail usually referred to as “junk” is a very profitable way for companies to generate business. A small percentage of responses to a mass mailing is all that is needed to more than compensate for the cost of the direct mail package.

You can use direct mail to expand your practice. Buy lists of new home owners; people who just started, inherited or relocated a business; or companies moving into the area. Read the local newspapers to get the names of couples who recently had a baby, or students in high school preparing for college, or recently promoted executives, or people nearing retirement. Any of these individuals might need a CPA’s expertise.

A basic direct mail package consists of four elements: a special promotional envelope, a “personalized” letter, a brochure or pamphlet explaining in detail the services offered, and a
response device. The response device represents the “call to action.” It is usually a postage-paid, self-addressed card that can be filled out and returned to request more information or to set up an appointment.

Take a look at the direct mail packages you receive—especially those that may have attracted your interest. Model your direct mail after these, noting the writing style, design and content.

To determine what mailing lists are available, check with libraries, professional or trade associations, or chambers of commerce. Ask how much the lists cost and how many people/companies they contain. Remember, you’re playing the game of percentages—so the bigger the list, the better your chances.

**NEWSLETTERS/DIRECTORIES**

**Newsletters**

Newsletters distributed to clients and other targeted audiences can serve numerous purposes. They can provide financial or tax advice, announce new or expanded services, highlight firm news, and give you a forum for commenting on financial or economic news of the day. Newsletters should also be distributed to media outlets to provide editors with reasons to contact you or to fuel story ideas.

If you decide to publish a newsletter, consider issuing a readership survey every year. Finding out what your readers want to see in the newsletter and adjusting your editorial accordingly may help increase circulation.

**Directories**

One of the most popular reference sources is the Yellow Page advertising section of a telephone directory. Tens of millions of Americans each year cite the Yellow Pages as one of their primary ways to choose providers of goods and services. Ironically, companies typically underutilize this valuable and inexpensive means for promotion.

Display ads, although more expensive than plain or bold listings, can be very effective. They not only draw attention, they are also more often read than regular listings, provide more space with which to promote your firm, and present a sense of “stability and security.”
The White Pages, while not advertising-oriented, allow banner ads which run across the top of a page as well as offer bold listings. You can find out more about Yellow Page or White Page advertising through the directory's publisher, the phone company or an ad agency.

Professional directories can also be used effectively. (Many accept advertising to supplement their funding.) For example, there may be a directory which lists all the businesses in your town. Why not place an ad offering your services to small business owners?

Libraries are a good place to start to find out what directories exist and which accept advertisements. Check with your local chamber of commerce, too.

These examples of PR strategies should give you an idea of the variety of ways you can promote your firm, enhance its image and develop business. This chapter was by no means exhaustive. Consult your state society to learn more about PR opportunities available to you.

EVALUATING PR PROGRAMS

Evaluation is an integral part of any public relations program. Without measuring its effectiveness, you won't know if your PR is successful in achieving your goals.

Assessment and adjustment are the main components of evaluation. There are numerous methods of assessment depending on what public relations strategy you've used. For example:

- Survey new clients. Ask them how they heard about you. Did they see your brochure, read an article you authored or were quoted in, or hear you speak at a seminar? Keep notes on their comments and on their backgrounds (i.e., income level, marital status, occupation, etc.).

- Maintain lists of attendees at seminars, meetings or special events. Refer to these lists when you've secured a new client to see if the person attended. The lists will also help you track attendance at your events.

- Use a newsclip service (for print). A newsclip monitoring service can search for a one-time article in which you may
be quoted, or will contract on a monthly basis to locate and send all clips mentioning your name or firm. The clips will include the date and circulation of the publications. (Newsclip services generally provide articles two to six weeks after they appeared.)

You can also request a newsclip analysis which provides information such as angle of the story, dollar ad equivalent (i.e., what the same space would have cost if it were an ad), the audience's perceptions of your comments, audience demographics, etc.

- Have a transcription service provide an audio or videotape, or a typed transcript (for broadcast). As soon as you have scheduled an interview, notify a transcription service. Tell them the date, time, length, channel, subject matter, and interviewer's name so they can be prepared. They can usually scan for your segment up to 10 days after it has appeared.

If you own a VCR, you can record a television interview yourself and save time and money. For radio, you'll want an audio cassette tape of the interview. In either case, a transcript is helpful.

- Include a bind-in card, toll-free (800) telephone number or P.O. box in your advertising. Then you can count the returned cards, or the toll-free calls you received or the letters in your special P.O. box. These measurement techniques will help quantify your advertising.

- Track accepted offers for a "free first consultation" or the number of newsletter subscriptions.

If you are not satisfied with the results of your public relations programs, adjust the elements until your PR meets your expectations. Sometimes, it can be as simple as redesigning an ad, updating a promotional brochure or expanding the distribution of your press releases.
Handling Media Interviews

Mastering the art of the interview takes practice. It is best to begin with local newspapers which aren't usually looking for an angle of controversy.

During an interview, remember that you are the expert on the topic—that's why you are doing the interview. Take control of the discussion, get in your points and turn negative questions into positive or informative answers.

BEFORE THE INTERVIEW

Do your homework before the interview. Find out the background of the reporter, the editorial slant of the publication/station and the story angle the reporter is likely to take. Know the answers to these questions: What is the news "hook" that generates interest in the story? Does the reporter usually look for "dirt"? What is the objective of the story? Who else is being interviewed? When will this piece be aired or printed? Who are the audiences? What do they want to hear? What have they been told before by others? Is the interview part of a series, a seasonal wrap-up or a one-time feature? Will you get an advance copy, tape or transcript?
Being prepared is essential to a successful interview. Once you have determined the reporter's agenda, you can establish your own. Ask yourself: What do I want the audience to know? How can I subtly promote myself/my firm? What questions may be asked (and how do I answer them)? What backup information can I provide to help prove my point?

Also, you may request an advance list of the questions or topics to be covered during the interview, though not every reporter or editor will give it to you.

DURING THE INTERVIEW

At the start of the interview, present a short summary of the story. State your points and then support them with examples. If you present any facts or figures, make sure they're accurate and cite reference sources whenever possible.

Keep the interview on a "human" level. Laugh, smile and gesture appropriately. Use "I" or "my firm" instead of "we" or "the company." Avoid CPA jargon; speak in layman's terms so the audience—and interviewer—can understand.

Stick to the topic and make your major points as often as opportunity allows. Don't digress from the question or you'll risk losing your points. Using short sentences conveying one clear thought will help you. For broadcast media, be aware of time constraints so that your important points don't get cut off (that's why you should always say them first and then discuss more detailed information).

Don't volunteer additional information. You may strike a nerve that changes the focus of the interview. End your sentences after they have answered the questions. Never speak "off-the-record." There is really no such thing. It's advisable to tape an interview for a newspaper or magazine article. This way, if you're misquoted you can support your claim. Reviewing a tape will also help you hone your interviewing skills.

AFTER THE INTERVIEW

Call the newsclip or transcription service immediately (see "Evaluating PR Programs"). If the story strongly contrasts with the
information you provided during the interview, you can do one of two things: either call the reporter, point out the error and request a clarification, or prepare a “letter to the editor.” The letter will enable you to present your point of view to the editor. However, only a small percentage of these letters are published.

If the story was successful in positioning you as an expert, you’re sure to get calls not only from reporters but also from prospective clients.

The following are specific interview tips for print, radio and television media:

**Print**

- Expect quotes to be edited. Therefore, speak concisely, stay on the topic and make every word count.

- Ask for clarification of a question if you are unsure of its meaning. If you don’t have an answer, say that you are not able to answer that question but will get the information and call back the reporter.

- “No comment” is acceptable but it is preferable to rephrase the question so that you can give a favorable answer. This is called “bridging.”

**Example:**

*Question:* “Don’t CPAs have a large responsibility for the current savings and loan crisis facing the nation?”

*Bridge:* “There are several reasons for the S&L crisis and subsequent bailout…”

*Answer:* “First on the list is that, for the past several years, management and regulators allowed thrift institutions to make high-risk investments…” Then discuss the energy crisis in the Southwest, merger mania, high interest rates paid on deposits, etc., leaving CPAs out of it.

**Radio**

- Think before you speak. Don’t feel you must fill “dead air” time with “um’s” and “well’s.”
• Be conscious of the microphone but don’t feel that you need to speak directly into it. Microphones easily pick up voices that are reasonably close. Also, don’t tap the microphone. The audio crew is responsible for seeing that it works.

• Find out in advance whether the interview is “live” or “taped.” If it’s taped, the interview will be edited.

• Practice speaking and answering questions so that you can be eloquent on the air.

• Definitely do not speak “off-the-record.” The microphone might still be on while the segment is ending.

Television

The same tips apply with some additions:

• Dress appropriately and conservatively. Wear medium-to-pastel colors; men should wear suits and women should wear suits, dresses, or skirts and blouses. Colors are intensified on TV; pure white is too bright so wear gray. Avoid large or distinctive patterns, such as plaids and polka dots. Men should wear knee-high socks.

• Wear minimal and/or plain jewelry. Wear eyeglasses without metal frames.

• Speak naturally in terms of pitch and tone; don’t be afraid to raise or lower your voice, as the answer dictates.

• Gesture as you would in a normal conversation; don’t feel obligated to be overly animated. Keep eye contact with the host or other guests when speaking to them.

• Be prepared for the set-up of a television studio. There are lights all around which may make you hot (and maybe even sweat). A studio crew with cameramen may add a dozen people to the set. Try not to think about all the action going on around you.

An effective interview will enhance media contact, develop/solidify an “expert” image, increase visibility, and promote your practice.
Perfecting your public speaking skills will help you with media relations and community activities, and can improve your self-confidence when addressing a group. Also, people enjoy listening to a dynamic speaker and believe him or her to be more credible than someone who is uncomfortable at the podium.

**SPEAKERS BUREAUS**

Many state societies maintain speakers bureaus. The larger societies have registered several hundred CPAs to talk to various groups or to be guests on radio or television. Societies seek platforms for speakers by doing mailings offering a list of topics to business, civic, and community groups as well as to the broadcast media.

CPA societies establish speakers bureaus by sending questionnaires to members to determine their areas of interest and knowledge. They are then able to match speakers with requests. Inform your state society or local chapter that you are available for speaking engagements and provide the topics and types of groups you want to address.

You will increase your chances to be matched with a request by providing information that will make you stand out from other
CPAs. Provide detailed background information (schools, work experience, residences, etc.), including all media/public speaking experience. Also, offer to provide brochures and to present slides, videos or other audiovisual aids.

Once you have established yourself as a speaker, requests may come to you directly. On your own, try pitching an idea for a speech to community organizations or town officials, telling them how it would benefit their constituents.

**BEING AN EFFECTIVE SPEAKER**

In order to hold your audience's attention, target your speech to the particular audience you're addressing. The content should focus solely on the needs of your audience, and vocabulary should never be over their heads or condescending.

Weave into your speech a few contemporary issues that you know are of particular interest or concern to your audience. To do so, you'll have to research the backgrounds and experiences of the people in the group.

Where possible, include some personal anecdotes or appropriate humorous stories. Even within the confines of a serious talk, a touch of levity can be very effective in renewing audience interest and attention.

Here are some tips to improve your speech. Use famous quotes to add appeal and demonstrate your resourcefulness. Don't talk jargon; keep it simple. Inflection enables you to emphasize key points in your speech and helps prevent monotony. Pause between thoughts, giving the audience time to absorb your statements. After writing the speech, practice reading it aloud and when you're comfortable, time it. Make sure your presentation fits within the time allotted to you (the hosts may be uneasy if the speech is too long or too short). Remember, too, that delivering a speech from notes or outlines is far more interesting and, therefore, more effective than reading the speech verbatim.

To further increase appeal, consider a videotape, slide presentation or other audiovisual aid. If your speech must convey a lot of numbers or comparative information, definitely use audiovisual aids (see "Producing PR Materials").

Body language is also very important in public speaking. Never slouch or weave from side to side while at the podium. Make
frequent eye contact with the audience. Smile and use hand gestures to emphasize key points.

The AICPA makes available to its members an extensive file of prepared speeches on numerous topics (see “AICPA Materials”). These speeches are for both the general public and business audiences. They are recommended for beginners; as you progress, you should customize your talk for a particular audience. Preparing your own speech helps you ad-lib and gives a more stimulating presentation.

Speechwriting itself is a career. You may want to hire a freelance speechwriter if you’re expecting a large or VIP crowd.
Producing PR Materials

The AICPA and your state society currently have available a variety of materials that can be sources of ideas for your own public relations pieces. Your state society can also offer guidance in producing materials.

Although you may have a modest budget, your direct mail pieces or handouts should look as professional as possible. Printed materials can be greatly enhanced with professional help, and audiovisual aids should be prepared by a skilled professional. However, there is collateral material that you can produce yourself.

PRINTED MATERIALS

Printed materials are your image. They reflect you, your firm and its services. Therefore, it is essential that your printed collateral is designed well. Good design also leads readers through the copy, highlights important information, presents graphics to convey key messages, and keeps readers interested. To develop effective collateral material, follow these basic rules:

• Write clearly and concisely;
• Do not use technical vocabulary or jargon;
- Be sure the piece is graphically easy to read;
- Strive for a clean, clear look with lots of white space;
- Get to the point quickly and don't digress from it;
- Make your firm identity/logo obvious.

Printed material encompasses everything from something as small as an 8-1/2" x 11" typed sheet to something large like a full-color, 100-page book. If you do not use a public relations practitioner for assistance, obtain advice from a local printer. A print shop or reproduction center can also put you in touch with designers and, in many cases, an editor or freelance writer.

The types of items you may need to produce depend upon your business interests and resources. Here are some possibilities:

Responses to public announcements or ads. These may consist of a form letter or additional literature.

Leaflets. If they're fewer than eight pages, you may want to use one sheet of paper, folded into panels.

Newsletters. These can be two or more pages. Since they are usually produced on a regular basis, it is best to use professional editorial help.

Booklets, brochures. Depending on your budget, you may want to contact several vendors to determine current print and paper costs. Small publications can promote your firm's history, services and employment opportunities. Employee booklets inform new staff members of your policies and benefits.

Posters. Larger pieces designed for posting should be done by a professional.

After the piece is written, decide whether to hire a graphic designer or to produce it yourself. Designers will give you estimates of their fees so that you will know the costs in advance. Consult your local classified telephone directory for listings of the services you need or contact your state society for referrals.

**AUDIOVISUAL PRESENTATIONS**

Audiovisual presentations are a great way to enhance a speech, stimulate attendance to a special event, foster discussions, or explain complicated information. As the saying goes, "One picture is worth a thousand words."
Producing PR Materials

An audiovisual presentation does not need to be costly or complicated. For example, a videocassette recorder and projector can be easily set up and operated. Or, at your request, a technician from the audiovisual company will operate the equipment for a nominal fee.

A wide variety of audiovisual options are available, such as:

- 35mm slides
- 16mm film
- Sound filmstrip
- Videotape
- Audio cassettes
- Super-8 film

Slides are probably one of the simplest and least expensive visuals to produce and can be an effective addition to a speech. Any photo lab can handle the processing and mounting of slides.

When considering film, slides or a videotape, you can research talent and costs yourself or hire someone to oversee the project. If you are producing slides in volume, shop around for the best price.

Consult your local directory for producers of audiovisual material. If there are none in the immediate vicinity, a local radio or TV station may be able to provide leads.

PHOTOGRAPHY

When coordinating photography, a local photographer may be available through the community newspaper. Explain the assignment and determine the rate beforehand. Photographers usually charge for their time, and rates can vary greatly. Print development costs are a separate fee. If you use an individual photographer regularly, you may be able to get a special rate. Also, once photographers understand your needs, they can work quickly and unobtrusively.

PROFESSIONAL PR HELP

If you plan an extensive, ongoing PR campaign, it may be worthwhile to contract for the services of an outside public relations firm or individual. In this case, the PR professional can assume responsibility for the technical aspects of your production needs.
such as printing, copy preparation or layout. Although it is an extra expense, it saves time and assures quality advice and product, removing the responsibility from your shoulders. This professional also becomes acquainted with your business and its needs and can be a valuable resource for you. You can obtain these services on either a retainer or per-project basis. Discuss your plans with the individual so that you both agree on the requirements and the best way to work together.
AICPA Materials

The Institute’s materials can be used by practitioners to help establish themselves as sources of information on financial matters. Using these materials, CPAs can create a market for the wide range of services they provide to the public, not only at tax season, but all year long, in a variety of situations — from consulting with small business owners about whether to sell or refinance their companies to addressing parents’ groups on applying for college tuition loans.

Listed below is a sampling of the various resources produced for you by the AICPA Public Relations staff.

SPEECHES

These timely, 15-minute speeches are appropriate for general and business audiences:

- **Financial Recordkeeping: Organizing Your Past to Plan Your Future**
- **Estate Planning Tips for Individuals**
- **Shaping Up Your Future with Personal Financial Planning**
Public Relations Guide for CPAs

- A Home Equity Loan: Is It Right for You?
- How to Get the Bank Loan You Need
- How CPAs Solve the Problems of Small Business Owners

PRINT MATERIALS

Colorful brochures are also available to use in helping consumers manage their finances:

- Saving for College: Easing the Financial Burden
- Do I Need Personal Financial Planning?
- Retirement Planning: Achieving Financial Security for Your Future
- Find Out What You’re Worth with Your Own Personal Financial Statement

Other brochures are geared toward small business owners. They include:

- Planning Your Company’s Growth
- Securing a Loan for Your Company
- Managing Your Business Dollars
- Connecting Your Business with the Right Computer System

The AICPA Communications Division has also developed brochures and booklets on CPA services, including:

- What Does a CPA Do? A Guide to CPA Services
- How to Choose and Use a CPA

All brochures provide space on the back panel so that you can imprint your firm’s name.

FOR BROADCAST

The AICPA offers public relations assistance to state societies by producing 15-, 20-, and 30-second public service announcements (PSAs) during tax season. State societies then place the PSAs,
which offer important financial tips, on local radio stations. (Each announcement identifies the state society.) You may want to work with your state society chapter to get the announcements on the air.

State societies also receive suggested scripts for 10-minute television (or radio) talk shows or interviews. These scripts are meant as a guide to help set up programming with local stations. They can be used by CPAs as well. If you are interested in appearing on television or radio programs, these scripts will help you get started.

The Communications Division also produces tax season and year-end tax planning materials for general audiences. Updated annually, these materials include a color slide presentation and accompanying script, a speech and a brochure highlighting the speech and slide presentation.

FINANCIAL MANAGEMENT SEMINAR FOR NONPROFIT ORGANIZATIONS

This one-day program was developed to help administrators of nonprofit organizations understand basic accounting and financial concepts and to explain the services CPAs can provide to nonprofit groups. All materials are included in a binder. Discussion leader notes and outlines for participants cover the following topics:

- Introduction to Accounting
- Financial Planning and Budgeting
- Internal Controls
- Tax Status
- Preparing Financial Data for Fund Raising

HOW TO OBTAIN AICPA PUBLIC RELATIONS MATERIALS

If you need any of the public relations items produced by the AICPA, or would like to obtain the catalog, “Promotional and Marketing Materials for CPAs,” call the Communications Division at (212) 575-5574.
Numerous books have been written about every aspect of the art of public relations. Below are some suggested reference sources and practitioner tools to help you with your PR programs.

**GENERAL BOOKS**

**Black, Sam**  
*An Introduction to PR*  
Keswick House, 3 Greenway,  
London N2O8EE: Modina Press, 1989

**Brough, Bruce**  
*Publicity and Public Relations Guide for Business*  
Sunnyvale, CA: Oasis Press, 1986

**Cutlip, Scott/Center, Allen**  

**Reilly, Robert**  
*Public Relations in Action*, 2nd ed.  
Public Relations Guide for CPAs

Wilcox, Dennis L., Ault, Phillip H., and Agee, Warren K.
Public Relations: Strategies and Tactics, 2nd ed.

BUSINESS/
PROFESSIONAL/MANAGEMENT

Benson, Richard
Secrets of Successful Direct Mail
Lincolnwood, IL: National Textbook, 1989

Breen, George/Blankenship, A.B.
Do-It-Yourself Marketing Research, 3rd Ed.

Brody, E.W.
Professional Practice Development

Evans, Fred J.
Westport, CT: Quorum Books, 1987

Gray, James G., Jr.
Managing the Corporate Image: The Key to Public Trust
Westport, CT: Greenwood Press, 1986

Harris, April
Special Events: Planning for Success
Washington, DC: Case, 1988

Kruckeberg, Dean/Starck, Kenneth
Public Relations & Community: A Reconstructed Theory
New York: Praeger, 1988

WRITING/GRAPHICS/DESIGN

The Complete Guide to Creating Successful Brochures
Beach, Mark, et al.
Getting it Printed: How to Work with Printers and Graphic Art Services
Portland, OR: Coast to Coast Books, 1987

Douglas, G.
Writing for Public Relations
Columbus, OH: Merrill, 1980

Detz, J.
How to Write and Give a Speech
New York: St. Martin's Press, 1985

Marsh, Patrick
Messages That Work: Guide to Communication Design

Newsome, Doug and Carrell, Bob
Public Relations Writing: Form and Style
Belmont, CA: Wadsworth, 1986

Roman, Kenneth and Raphaelson, Joel
Writing That Works

MEDIA DIRECTORIES

Bacon's Publicity Checker: Magazines/Newspapers
322 S. Michigan, Chicago, IL 60604
(also publishes Radio/TV Directory)
1-800-261-0561; (312) 922-2400 in IL

Burrelle's Media Directories
(NY, NJ, PA, CT, ME, NH, MA, RI, VT)
75 E. Northfield, Livingston, NJ 07039
1-800-631-1160

Gebbie Press All-in-One Directory
(newspaper, magazine, TV, radio, and cable)
P.O. Box 1000, New Paltz, NY 12561
(914) 255-7560

TV Contacts; Radio Contacts; Cable Contacts
Larimi
5 West 37th Street, New York, NY 10018
PERIODICALS

Contacts
Larimi
5 West 37th Street, New York, NY 10018
(Weekly newsletter describing placement opportunities)

Jack O’Dwyer’s Newsletter (weekly)
271 Madison Avenue
New York, NY 10016
(212) 679-2471

Public Relations Journal (monthly magazine)
Public Relations Society of America
33 Irving Place
New York, NY 10003

NEWSCLIP SERVICES

Burrelle’s Newsclip Service
75 E. Northfield, Livingston, NJ 07039
1-800-631-1160

Newsclip, Inc.
(National coverage of over 12,500 publications in all 50 states)
1-800-544-8433; (312) 751-7300 in IL

OTHER

Weiner, Richard
Professional’s Guide to Public Relations Services, 6th ed.
135 West 50th Street, New York, NY 10020
AMACOM, 1988 (212) 586-8100

A comprehensive bibliography, updated annually, is available from the Public Relations Society of America, PRSA Information Center, 33 Irving Place, New York, NY 10003
(212) 995-2230

Libraries also have literature on public relations.