Public relations guide for CPAs

American Institute of Certified Public Accountants

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Public Relations Guide for CPAs
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Introduction

The CPA: Out in Front

Over the past decade the climate for CPAs has changed. No longer are they behind the scenes but onstage, facing microphones and TV cameras. Answering questions, conducting seminars, informing the community on vital issues – their expertise is eagerly sought. CPAs are taking their place as recognized skilled professionals serving the public.

A five-minute stop at a well-stocked newsstand will confirm the growing interest in financial subjects. A record number of special interest magazines and newspapers directed to the general public focuses on money in all its aspects. In addition, daily newspapers nationwide contain features on money – acquiring, keeping, stretching, managing, investing and avoiding taxes on it. Books about money management regularly appear on the best-seller lists.

Developing consumer awareness has led to the increased use of professional services, especially those of the CPA. A Money magazine article entitled “Careers that are Revving Up” asserts that “opportunities in financial services are expanding because of the new attitude people have taken toward money. More Americans than ever feel that financial planning is worth the effort and expense…”

The two-income household, the many Americans who have started businesses from their homes and the increasing number of single parent households are but a few of the expanding markets requiring skilled financial advisors: professional CPAs.
Introduction

Why Public Relations?

Why should a CPA firm or practitioner undertake a public relations program? Consider the following issues before beginning:

What is the goal?

Who is the audience for your message or services?

How is this audience best reached?

The goal may be practice development, image enhancement or a bit of both. Either can be served by an ongoing public relations effort.

An articulate and well planned presentation before several groups may attract new clients. Serving as advisor to a community group will also provide positive public exposure and may be effective to build a practice. On the other hand, results are not always immediate. Public relations generally involves a long-range program, and it is difficult to measure short-term results.

If the purpose is image enhancement, activities may be more indirect. It is agreed that there is a need for "image enhancement" for CPAs - on their own behalf. Any opportunity for the CPA professional to appear and speak as a member of this profession affords an opportunity to enhance the image of the CPA profession.

Participation in high school career day programs sponsored by state societies to discuss the accounting profession with students; offering to speak on your special area of interest at a school or college in your community; writing a feature for the university newspaper or the community paper - these efforts can bring the accounting profession into focus as a body of skilled and civic-minded professionals.

Public relations should be a continuing effort so that over a period of time a particular public will be aware of the services available by a particular CPA professional or group of professionals. While precise measurement of the success of a public relations program is hard to define, your efforts will most likely be rewarded by a variety of results. Benefits can include being considered as an information resource by members of the local press; receiving comments from your peers about public relations projects, or being invited to address local and community groups.
This handbook is a basic guide in public relations communication. It is not meant to be a comprehensive course in public relations but can be especially useful for the CPA beginning such a program. This guide illustrates step-by-step procedures for presenting information in forms that give it appeal and adaptability to the media.

Public Relations, Ethics and Advertising

A change in AICPA rules has lifted the ban on advertising for CPA professionals. This affords new avenues for the CPA to present a message to a select audience. The AICPA Rules of Conduct of the Code of Professional Ethics, amended March 31, 1979, state: “A member shall not seek to obtain clients by advertising or other forms of solicitation in a manner that is false, misleading or deceptive.”

In conducting an advertising campaign, the CPA professional is first and foremost aware of the profession and its standards. A high code of ethics should always prevail, and any advertising efforts must be carried out within these parameters with taste and discretion.

With these tenets in mind, CPAs may choose to advertise. Direct mail, appropriate ads in professional journals, consumer publications and association newsletters can effectively communicate a professional message to a receptive public. Local broadcast media may be especially effective. Whatever the medium, the ad is the first impression and the image projected. It should be a reflection of the CPA’s own professionalism.

The same questions apply as to goals and audience. Since there is a good deal of competition for advertising dollars, astute research is necessary. A good place to begin is the library. Various publications will reveal readership of magazines or journals.

In placing paid advertising, it may be wise to consult professionals; a public relations or advertising agency can help determine the appropriate media and can design and produce an effective ad. The CPA makes the final decision, however, and must know the message thoroughly and the targeted audience for that message.

Public Affairs, Community Relations and the CPA

One of the best ways to achieve recognition as a professional is through one’s own community and activities therein. CPAs are involved community members, active participants and skilled leaders in professional, educational, civic and philanthropic organizations. By involvement and participation, the CPA can achieve a sense of satisfaction and accomplishment.
State societies of CPAs can help in efforts to become active in public and community affairs. If there is a speakers bureau, the CPA should consider registering so that the society may draw on those skills. State societies and local chapters are involved in many public affairs and community activities in which the CPA can participate. They may include:

- income tax return assistance to disadvantaged and low income groups
- seminars for nonprofit organizations on financial management and current accounting, auditing and tax developments
- workshops to help owners of small businesses to organize and analyze basic accounting information
- a variety of projects at various levels within the community or a region or a state

Such activities can strengthen one's professional skills. As an active participant in community affairs, CPAs meet new people, establish business contacts, learn and develop management and leadership skills, and work with and become known to community leaders. This helps the CPA in practice and enhances the image of the profession.
The Press Interview/
Talking to Reporters

Accounting is in the news. Money is making news, and it is not unlikely that you as a professional CPA may be called by a reporter who is working on a story. A CPA can handle such an interview skillfully.

The reporter or writer has already researched the topic to gather as much information as possible and now seeks an outside source to provide additional data or viewpoint. In this case the source is you, the CPA.

As the spokesperson, you are the expert regardless of the interviewer's viewpoint, attitude or knowledge. You should expect to lead the discussion, to take charge of the interview. In that role you are able to direct the discussion and interject general observations that help to explain the subject.

Before the Interview

Ask as many questions as you need to understand or clarify exactly what the story is; the reporter should be willing to tell you at the time an interview is requested. The more you know ahead of time,
The Press Interview/Talking to Reporters

The better you can prepare. In preparation for an interview, consider the following questions:

1. Is there a particular point of view or "angle" for the story?
2. Who is the audience?
3. What is this audience being told by other sources?
4. What do these readers or listeners expect to hear from you?
5. What do they need to know?
6. What is the objective of this story?

In addition:

7. Learn as much as possible about the editorial views of the publication or organization requesting the interview. Be aware of the style of the interviewer, if possible: Is it belligerent, sarcastic, polite, overbearing?
8. Anticipate questions. Although interviewers generally do not submit questions beforehand, it is common to list the subject(s) for discussion. That knowledge allows you to seek expert advice (if necessary) and to prepare probable questions and answers.
9. Anticipate possible problems or controversy. The more specific you can be, the better the interview. Be prepared to cite examples. The details and documentation should be clear in your mind so that you can quickly summarize and present a perspective. Reporters may look for controversy; conflict makes for a more interesting story. Deal with the issue at hand and don’t be drawn into argument; you are the expert.

The Interview

1. Have prepared a short, quotable summary of the story at the start of the interview.
2. Present the examples you have researched to illustrate points without going overboard in technical detail.
3. Present facts and figures as appropriate (government sources are considered reliable and credible).
4. Keep your sense of humor.
5. Keep in mind your reason for agreeing to the interview.

Example: The profession is imposing a range of new rules to improve its self-regulatory ability.

6. Use the first person singular "I" rather than "we."
7. Throughout, keep ideas and language as simple and precise
as possible, leaving minimum room for error in the final story. Avoid professional jargon.

8. Stay on track. Don't bring ethics into an interview about taxation (unless it serves to add breadth to the discussion or to illustrate a point).

9. Speak in short sentences; key phrases, reiteration of major points and repetition of the central theme can keep the interview within bounds. Short statements are more likely to be quoted in the press.

Examples: “Simplification of tax laws is on the way.”

“CPAs can help businesses survive tough times.”

10. Be accurate in your statements. If you do not know the answer, say so. If an interviewer's question is not germane, amend it so that the information it generates can be useful.

11. Speak at your own pace. Do not be swayed by the manner of an interviewer's aggressive or rapid questioning technique. Take your time.

12. Turn negatives into positives when possible. Begin with a positive answer to questions based on a critical premise.

Example: A question about substandard performance can be answered in terms of peer review and the government's acceptance of the profession's self-regulation.

13. If the reporter is in error, make a correction to ensure that facts are accurate. If questions seem narrowly focused, your answers can present a broader perspective.

14. Remember that the reporter or interviewer is not the target audience but a conduit to the readers or listeners you wish to reach. Direct your answers to that audience.

15. A good interview involves a degree of flexibility and give-and-take; however, you are not obliged to say more than you want to. Stop when you consider it appropriate if a reporter seems to be probing beyond the point of your desire to discuss a question.

16. Sometimes a reporter will ask for “off-the-record” information. Be sure you are in agreement as to what this means. Does it mean data to help evaluate the facts the writer already has? Or does he or she want information for use without crediting you? Find out. There is a difference between off-the-record information which is simply background and that which is actually confidential. The majority of newspaper people are trustworthy in respect-
The Press Interview/Talking to Reporters

ing a confidence; however, to be on the safe side, it is best not to say anything you don’t want to see in print.

After the Interview

By the time the story does get into print, you may not recognize your part in it. The reporter may have put emphasis on entirely different points, especially if it is controversial; or a point that you considered minor has been played up. A writer’s, and the editor’s, judgment has prevailed. That is the publication’s prerogative. If the story contains a serious error, call the reporter and point it out promptly.

The objective of business reporters is to bring economic facts to the public. CPAs can help them to assemble and interpret these facts. At the same time, CPAs can benefit by wide and fair portrayal of the accounting profession. Your helping with the story may secure you the position of a knowledgeable business person with expertise in a certain area, willing and able to talk with the press as a reliable, cooperative source. This is an excellent position for you as a professional CPA.
The cornerstone of a public relations campaign is the printed word. One method of reaching a good number of people with your message is the print media: newspapers, magazines, newsletters, bulletins. Reporters, editors and publishers are responsible for communication by means of the written word.

Getting your news into print in newspapers and magazines involves specific steps. There is never a guarantee that your story will be printed, but you can certainly raise the odds in your favor.

The most common first step is to prepare a news release for the newspaper(s) and send it to the correct editor. If you live in a smaller city, the local paper (sometimes part of a county-wide chain, sometimes independently owned) is the best way for you to deliver your message to the audience you want to reach. (If the paper is part of a chain, you may get the benefit of appearance in each town within the region served by that chain of papers.) Send photocopies if you submit a story to more than one publication.

It is important for you to know the newspapers in your area and their readership. A writer or editor's first responsibility is to these readers. Whom do you want to reach? Check the masthead of the paper or telephone to find out who wants your news. (If you are in a smaller community, it is a good idea to develop a friendly working relationship with the financial or business editor.)

If you are the featured speaker at the Lions Club luncheon next week, don't send the announcement to the front-page news editor; the business section or community events calendar would be more likely to print it. Newspaper or department editors welcome items that
appeal to local readership if it is timely and newsworthy. Put yourself in that editor’s shoes: Does your news fit?

Even though your public relations campaign is an ongoing effort, don’t send a press release every time your organization schedules a meeting if there is nothing interesting afoot; like the boy who cried wolf, by the time you have an exciting speaker or event, the editor will be tired of seeing your letterhead with nothing newsworthy and may toss the story that would have made it into print.

**Remember:** Keep the language simple and easy to read. Although business reporters and editors are often familiar with the jargon of particular professions, remember that you are not writing for colleagues but to a lay audience. Also, a news story is not an official document or technical paper. Its purpose is to relay information in a way that will interest the editor and the readers.

**Double Coverage**

It may happen that an event is of interest to more than one department in the newspaper. For instance, you may be speaking to a community group on the pros and cons of the school bond issue coming up for a vote. This news would be of interest to the education or school page editor as well as to the financial editor. *Be sure to let each one know that the other has received the information.* This allows coordination of the item and complete coverage for you.

**What’s Interesting?**

Elections, appointments and controversy are more newsworthy than a “regular meeting of.” Opportunities for coverage might include a new service by your firm (helping older people with their tax returns free of charge); an internship program in your firm for students studying accounting; talking to an elementary school math class about budgeting and savings; sponsorship of a seminar series on tax planning.

**Timing**

You’ve done your homework and written a good release for your local paper and sent it in to the correct department editor. Follow up within a few days with a telephone call. This brief call gives you a chance to ask whether further data is needed, to add information to
your story and to ask whether the news will be printed.

Timing plays a crucial role. If your news can be tied in with a broader news story, so much the better. Your firm’s tax seminars, scheduled for the weeks after changes in national or state tax laws are announced, are doubly interesting to an editor looking for local news. On the other hand, the announcement of the new internship program your firm is beginning may be squeezed out on the day it was to be printed; a bigger story may claim the space. Chances are it will get in at a later date.

**Writing News Releases**

If you are writing your own news release, the familiar journalistic rule still applies. Cover the six questions as early as possible:

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Newspapers rely on press releases for material. And they receive thousands. The way yours is written then will have a good deal to do with whether it is considered seriously even before the decision is made about publishing it. These few hints are important:

Use plain white 8½” x 11” paper. Colored paper will stand out, but editors agree that the impact is negative. Include the name, address and telephone number of the organization submitting it, and someone’s name as the “contact” person if the newspaper needs additional information.

The date of issue and the “release” date are also part of the data. If the event is imminent, FOR IMMEDIATE RELEASE is appropriate within the heading. That is, the information is timely and should be used as quickly as possible.

Releases should be typewritten, double-spaced, paragraphs indented 5 or 10 spaces; leave lots of white space. Editors “edit” and need space for changes, additions and punctuation.

Releases should be about 300 words or so; never more than two pages.

**Reminder:** Cover all pertinent information within the first two paragraphs, using the remainder of the release for supporting material. If the item is cut, the reporter can make
cuts from the bottom up and not lose the most important point of your release. Make it as easy as possible for the newspaper writer to handle your story.

What's in a Title?

A word about titles or headlines for releases. Include in the release title facts or ideas relevant to those contained within the story – not “fluff” or copy that has no relevance to the story you plan to tell. Make every word count, from the title through to the end.

Example: New Tax Laws to Have Impact on Community (NO)
State Plans One Percent Raise in Sales Tax (YES)

Image Building

It may be possible, by giving more than casual attention to the writing of a news release, to inject specific image-building concepts into a story. This should be accomplished without strain or obvious effort. The following ideas should be considered:

■ The accounting profession fills an essential need of society
■ The CPA is a member of a learned profession
■ The qualities that denote a CPA include skill (from training and experience), objectivity and independence
■ The work and abilities of the CPA are diverse and creative
■ The accounting profession is dynamic in terms of everyday issues
■ The profession is rapidly expanding and is an excellent career choice for the future
■ The CPA is a multi-dimensional person, concerned with more than the immediate responsibilities of the profession

Is It Feature Material?

If you have something really interesting to promote and you have reason to think it rates a feature story, suggest it to the feature editor – don’t try to write the article yourself. You should have all the information in hand – including facts, figures, and a good reason why a feature is warranted. In your communication with the feature editor:

— tell the editor you are offering such a story
— summarize the idea briefly
— relate the story to the editor's audience
— emphasize the scope and importance of the story
— give a few interesting details
— suggest alternate approaches
— indicate photo possibilities

A new tax change and its implications for the community may be a suitable subject for a small town paper. The special tax season materials available from the AICPA could serve as the basis for a timely feature or series of columns.

Who's Saying What?

In terms of a news story, the value of a speech may be in its content or in the speaker — and, perhaps, in the nature of the audience. If the president of the state CPA society is speaking at a society meeting, that's not unusual; the content of the address is important. If a CPA is a member of the Federal Office of Management and Budget and is visiting the home town, the speaker is just as important as the content of the address.

In submitting a story about a guest speaker, include background information and a photo and, if possible, use a quote from the speech in the headline or as a lead in the first paragraph.

Photos

If possible, include a photo with the release; it may be the extra ingredient that sells the story. A reader's eye is drawn to a picture and editors look for good photos to accompany a story.

Newspapers prefer black and white glossy prints. Color prints or Polaroid photos must go through an extra process which costs the paper money.

Identifying captions should accompany photos. They should be typed on a separate sheet of paper and taped to the back of the photo so that the caption is visible beneath the picture. Identify the persons in the picture and describe the activity. Put your name and address on the back of the photo.

An amateur photographer can often turn in a creditable job and, as long as the photos are clear, they may be just what you need. On occasion it may be worth the expense to hire a professional photographer; many newspaper photographers moonlight during off-hours. Photographer's fees vary greatly, and it's wise to establish the rate before you engage one.
Trade magazines are natural targets for the CPA professional and, as the director of communications for a nationally recognized major accounting firm observed, "Marketing is targeted more and more to specialized audiences, especially through trade magazines." If you are knowledgeable about a particular industry, this is an excellent way to get your message across.

Magazines have a longer lead time and, in place of a news release, a letter to an editor is the first step. Present your idea clearly in non-technical language and outline the major points of the article. Document how the article will serve that publication's readers. If the idea is acceptable, an editor may ask you to write the article or to have a writer do the article, consulting with you.

It is more difficult getting into publications directed to the general public (consumer publications); however, if you can come up with a good idea and one that has broad enough appeal for the larger audience, this is a possibility. An article on mortgages, for instance, might be of interest to a woman's magazine. An article suggestion about setting up an accounting system for a new small business venture might be welcomed by women's and the other publications directed to new owners of small businesses. (Consult the masthead of publications to find out the proper person to write to.)

Here too you must do some research to find out which magazines write for which audiences. Do you want to reach readers of a family magazine about setting up a household financial system – or a high income bracket reader about estate planning or investing? Know the market you want to reach.
Broadcasters are regulated by the Federal Communications Commission (FCC), which has recently proposed the deregulation of TV air time so that television stations will have the freedom to decide how much news and advertising are presented. Formerly, guidelines dictated minimum percentages of air time for news, information and local programming as well as the number of commercials allowed per hour. As deregulation takes effect, television stations will assume sole discretion in their presentations. The radio industry was deregulated in 1981.

However, there are as many entrees to air time as to space in the print media, and the same principle applies; the broadcaster is addressing a particular segment of the public and needs material of interest to this audience. CPAs are knowledgeable about a variety of topics of interest to specific publics, and state societies have increasingly used the broadcast media in their public relations efforts.

Local broadcasters welcome organizations or individuals who, as members of the community, can speak authoritatively on its behalf and can provide specific information. The professional CPA fills these qualifications. The community is becoming ever wider as local issues make national news — witness the continuing financial problems municipalities encounter in the delivery of public service. They are reported locally, of course, but they are increasingly being seen on network evening news programs.
On the Air

What type of program can use the talents and expertise of a CPA? These are a variety of possibilities:

News programs
Documentaries on local issues — public or community affairs
Roundtable discussions
Listener phone-in shows
Host talk shows (Johnny Carson, Bill Boggs, Phil Donahue)
Programs directed to women
Station editorials (and replies)
Business and financial news programs ("Wall Street Week")
Special interest programs (managing your money)

As with newspapers, it is a good idea to know whom to talk to at your local radio/TV station: the station manager, program director, news director or public service director. There is no substitute for an in-person meeting. Public relations people at state societies report that they always try to meet and talk to broadcast people. Some meet at least once a year with the stations to review programming plans. They report a close association with the media and are called on as a news resource. The stations or networks then know that the professional CPA (through the state society) can furnish accurate information and can talk knowledgeably on specific topics.

News releases are also a means to reach broadcasters. The release should be short, easily read and understood. State societies report that they send regular mailings to local stations to suggest topics to broadcasters and offer to provide qualified speakers on these topics. (If broadcasting is of interest to you, get in touch with your state society to offer your services. Indicate a topic or area that interests you and on which you are qualified to speak.) This is an effective way to establish concrete relations with a local station and serves as a solid basis for an ongoing relationship as a resource.

The media uses the AICPA on a continuing basis as a professional resource. The Institute distributes professionally produced materials to its members. State societies engaging in ongoing public relations efforts use these materials extensively — sometimes directly, sometimes as a base for producing their own media information.

Radio

Radio represents one of the best service and promotional vehicles for the professional; one estimate states that Americans listen to approximately two and a half hours of radio each day. A good
number of state societies use this medium as an integral part of their public relations program.

A growing number of radio programs focus on educational or public/consumer issues, as well as on local and regional issues. Networks target their programming to specific groups, which include financial advice to women, reports on investment opportunities and discussion of political issues. Become familiar with local programming and see where you fit in. If you are scheduled for a "live" or taped show, be prepared. Know what information will be required and how it fits into the show. Are you the sole guest with a host or moderator? You will be talking much more than if you are one of a number of panelists. If it is a phone-in show, be prepared as well as possible to answer listener questions.

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**Television**

If a practitioner is to appear on television, certain “rules” apply. Again, know the topic of the program, the audience, and what is expected of you. In addition, the following will be of help:

- Rehearse. That is, practice speaking. Talk to a friend (not a CPA) about the topic for the show. In this way you can eliminate any technical vocabulary the viewer won’t understand. Ask your friend to let you know of any annoying or distracting mannerisms you may not be aware of: fussing with your hair or your tie, using your hands too much, etc.

- Practice in front of the mirror. Do several run-throughs and watch yourself. In addition to your friend’s help, note for yourself how you look when you are talking, and try to correct what you find wrong.

*Note:* You can also get some professional help. Consultants are available to help with diction and can provide polish and professionalism to your delivery.

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**What to Wear**

Television has certain technical limitations in terms of handling sharp contrasts (black and white) and intense color (bright reds and greens). Although the technology has come a long way from the early “television blue” requirements, results are better if these guidelines are followed:

1. Wear a medium-to-pastel suit or dress. Camel, heather blue or light gray work well.
2. Wear a shirt or blouse in a different color but about the same intensity. Blue, light yellow, ivory or pink are suitable.

3. Wear a conservative tie or scarf in a medium contrast color or colors. A pocket square should not be white.

4. Avoid distinctive patterns such as houndstooth or large plaid; they make the picture "vibrate." Stick with solids, tweeds or pinstripes.

5. Men: wear long socks so that trousers and socks cover legs completely when you are seated. Collars should fit properly and ties should be tied snugly in the center. If your appearance is late-day or evening, you will want to shave before the tape rolls.

6. Wear modest, conservative, non-shiny jewelry and eyeglasses. If you have several pairs of glasses, all equally comfortable, wear those without metal frames.

7. Other things being equal, wear clothes that make you feel good.

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**Additional Points**

1. If you will be using notes, write them on yellow or pale blue paper.

2. When taping time comes and "you’re on," talk naturally. Do not tap the microphone — it will pick up your voice. Speak in a normal tone.

3. Be as natural as possible. When you talk to the program host or another guest, look at that person. When you are listening or involved in a dialogue, react as naturally as possible to what others are saying.

4. Avoid exaggerated and distracting gestures; these detract from your delivery. TV is a close-up medium and magnifies every movement. Be yourself — in control.

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**Visual Aids**

If you would like to use visual aids, consult with the station ahead of time so that the necessary equipment will be available. Slides, films and photos can liven up a presentation. Have them professionally prepared, and rehearse your presentation with them beforehand.

The following suggestions will be of assistance:

- Be sure that copy written to accompany visual aids 'fits' with the slide, film or photo being shown.
On the Air

- Time your copy at a slightly slower pace than for radio. Standard announcements for TV run 10 seconds (about 20 words), 20 seconds (40 words) and 60 seconds (125 words).
- Provide one slide or photo for each 10-second spot, two for a 20-second spot, etc.
- In most cases slides are preferable to photographs. They are not expensive to have made. If photos are used, matte or dull surface prints are preferable (less light glare).
- If you want your visual aids returned, be sure to request that.

Cable TV

One of the most effective and accessible means for publicity in smaller towns lies in cable television. Current estimates indicate that about 41 percent of the country’s 77.8 million homes have cable; conservative projections double that figure by the end of the decade. It is a powerful educational medium and will require a good deal of material to serve its viewers well.

One of the advantages to cable TV is that, in some areas, cable companies must provide an "access channel" — that is, a channel through which the public can communicate. This represents an ideal opportunity not only for organizations but for firms and individual practitioners to produce their own programs. Call your local cable station for guidance in this area.

If there is a cable network in your region, talk to the station manager or program director about what opportunities exist. There are regular shows given over to a particular subject such as health and medical topics; there may already be a financial or money-oriented program directed to a particular audience or there may be a need for one. One of the regular shows may need your expertise as a CPA.

Although cable TV is still in its infancy, many opportunities exist. Production costs are far less than for the larger networks, allowing more flexibility in programming. Try it.
Public Speaking

Speakers Bureaus

Many state societies maintain speakers bureaus. The larger societies report as many as 200-300 CPAs registered statewide who are skilled and available to talk to various groups or to be a guest on radio or television to discuss particular topics.

Societies report that they seek platforms for speakers by mailings to business, civic and community groups as well as to the broadcast media, offering a list of appropriate topics for the group.

In establishing a speakers bureau, state CPA societies send questionnaires to members to elicit their area of interest and then match these with requests for speakers. Societies maintain extensive files on speakers and topics and consistently evaluate and update both. It is a good idea to let your state society or local chapter know you are available for speaking engagements and to provide the topics and types of groups you are prepared to address. Matching topics with audiences and producing an appropriate, skilled speaker is a constant challenge for the speakers bureau. The greater the file, and the more detail on each professional within the file, the higher the odds for a good match.

The Effective Speaker

A challenge for a speaker is to be as current as possible. The front page of today's newspaper is likely to suggest at least one topic the CPA is
equipped to address. The best potential speech topics are to be found in
the day's news events.

Specific information is more useful than generalities. In talking
about taxes, for instance, an audience is more curious about a new tax
credit that will put $50 more in their pockets than about how much
taxpayers paid in taxes last year. Or, a student audience considering
accounting as a career will want to know the job opportunities, salaries
and promotion opportunities when they graduate, rather than what the
long-range predictions are for the profession. Tie in specifically and as
currently as possible with the interests of the audience.

The AICPA has available to members an extensive file of prepared
speeches on numerous topics. They are directed to the general public
and to business audiences. These are recommended as starters; speakers
should consider their special audience and personalize the talk, relating
specifically to that group. (It is even better if a speaker does not need a
prepared talk. Having thought out the remarks and made brief notes, a
speaker may be able to give a lively and stimulating presentation.)

Most CPAs, however, will probably choose to work from a
prepared text or notes. To avoid the sound of "reading" a speech, a
speaker might use visual aids such as slides or photos. This can help
relieve the strain.

1. The audience looking at slides or photos is less aware of
whether or not a speech is being read.

2. The speaker may be more comfortable with audience attention
focused on the screen rather than on one's person (and may be able
to give a more spontaneous talk).

3. The speaker can glance ahead at the copy while the audience
is still absorbing what it has just seen or heard; this can make for a
more natural delivery for the speaker.

4. "One picture is worth a thousand words..." Visual aids help
considerably to illustrate and clarify verbal delivery, especially when
figures are involved.

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Don't Talk Technical

The better the CPA speaker can relate to the audience and its
particular needs and interests, the greater the chance for success.

Give examples that pertain to the experiences of the group
you are addressing. If you are talking to a group of prospective home-
owners, your own experiences in buying a house can make this a lively
address and can illustrate all the points you need to make. When you
accept an assignment, inquire about the audience and its expectations. If your talk covers totally new material to this group, prepare an outline or other handout so that listeners can follow your address. Be aware of the sophistication of your audience.

Don't try to cover too broad a range; limit the talk so that important points are presented and clearly explained. Don't use professional jargon (unless it's that of the group you are addressing). Speak in ordinary English; adequate preparation will help assure this.

No matter how short your talk, prepare yourself sufficiently. Even if you will only be introducing another speaker, know what you are going to say before you rise to say it. The best speakers talk so naturally it appears they haven't prepared at all. Fluent delivery comes from careful preparation augmented by speaking experience.

**The CPA's Contribution**

For those professional CPAs who have never addressed a group, public speaking is an excellent skill to acquire. Public speaking is an effective means of developing self-confidence and can fulfill the need for image enhancement. In addition to registering with a society or chapter speakers bureau, CPAs can seek opportunities for public speaking through other organizations within the community and should step forward to offer their services.

As members of a profession that address topics of vital interest in daily life, CPAs are often in a position to influence or clarify current issues within a community: bond issues, property values, transportation systems, school questions. The CPA, as an active member of a community, can be knowledgeable on business and financial, sociological or political issues.

A CPA may be asked to appear at a public meeting to answer questions, to sort out and put into perspective a particular issue within a region, such as the proposed new headquarters of a major corporation and its impact on the community or local business conditions and the community's economic standing. The format for such a meeting may be a panel discussion, with other professionals to explore various aspects of an issue. As an authority with much to offer, the CPA can ably serve the community and enhance the profession's image.
The AICPA Public Relations Division works to build a public image for the accounting profession by dealing with the media to describe the profession and its practitioners to the public and to the business community. Each year, the Institute's PR staff responds to hundreds of inquiries from the press and places news and feature stories in major newspapers and magazines, as well as on radio and television stations around the country.

A major AICPA program to support the public relations efforts of state societies and individual CPAs is the 750-word weekly newspaper column, “Money Management.” This column appears under a state society byline in more than 2,000 newspapers across the country, making it the most widely circulated newspaper column of its kind. “Money Management” provides ideas and advice on all areas of personal finance, from tax aspects of charitable donations to financial planning and budgeting for students to the best way to use a credit card.

The AICPA also prepares a variety of materials for use by state societies and CPAs, including speeches, a slide presentation, handouts and brochures. Some materials are designed for general audiences, while others are more appropriate for business audiences. The Institute’s materials can be used by practitioners to help establish a reputation within the community as a source of information on financial matters. Membership in civic and business/professional organizations broadens the range of people for whom the CPA professional can provide a service. Using materials available from the Institute, the CPA can create a market for this expertise. Not only at tax time, but all year, in a variety of situations — from consulting with a small business owner about whether to sell or refinance the company to addressing a parents' group on applying for a college tuition loan.
Print Materials

A selection of timely, 15-minute speeches is available to help you deliver your message to your community. For general audiences, the titles are:

- How to Build a Family Capital Base
- What Are You Worth Today? (How to Prepare Your Personal Financial Statement)
- Tax Planning: A Year Round Necessity
- Year-End Tax Planning
- Tax Season Tips

For business audiences, the following talks are available:

- How to Prepare to Apply for a Bank Loan
- How CPAs Solve the Problems of Local Business Owners
- To Sell or Not to Sell a Business
- Going Concerns
- How to be Sure Your Business Is Located in the Right Place
- Estate Planning for Owners of Small Businesses
- Microcomputer Applications for Small Businesses

New titles are constantly being added to both series.

A 20-minute tax season presentation for general audiences, updated annually, includes a script and color slides offering advice on preparing federal income tax returns.

Also available are colorful handouts that can be left with an audience after your talk or mailed to clients. Your firm name can be imprinted across the back panel.

- Personal Financial Statement Worksheet
- Year-End Worksheet for Tax Planning
- Tax Season Tips
- Budget and Cash Flow Worksheet
- Small Business Microcomputer Checklist

The AICPA has prepared brochures and booklets to explain your role to current and potential clients.

- “What Does a CPA Do?” explains the roles of the CPA as auditor, tax advisor, accountant and management advisor.
- “How to Choose and Use a CPA” answers such questions as: Who needs a CPA? How do you find a CPA? What qualifications should you look for? What do CPAs charge? How can you get the most value from a CPA’s services?
“What Else Can Financial Statements Tell You?” shows how to use a company's financial data to answer a wide range of non-financial questions.

“Public Service and the CPA” describes how CPAs are involved in helping their communities.

Broadcast Materials

The AICPA offers public relations assistance to state societies in the broadcast area by producing 30-second radio public service announcements (PSAs) several times a year. State societies then place the PSAs, which offer lively 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. Meant as a guide to help set up programming with local stations, the scripts can be used by CPAs as well as by societies. If you're interested in appearing on TV or radio programs, these scripts can give you some ideas on how to begin.

Financial Management Seminar

A one-day Financial Management Seminar for Nonprofit Organizations was prepared by the AICPA for presentation by state societies and local chapters. The program was developed to aid administrators of nonprofit organizations in their understanding of 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
- Local Requirements
- Preparing Financial Data for Fund Raising

The Financial Management Seminar offers public relations benefits, in terms of community goodwill, to the CPAs who present the program.

How to Obtain AICPA Public Relations Materials

If you're interested in obtaining the materials described, contact your state society or the AICPA Public Relations Division.
Producing Your Own PR Materials

The AICPA and your state society provide a variety of materials that can be sources of ideas for your own public relations pieces. Your state society can also offer guidance in how to produce your own materials. Although you may have a modest budget, your mailing pieces or handouts should look as professional as possible. Audiovisual materials do require the services of a skilled professional, and printed materials can benefit with professional help. However, if you are considering a simple, straightforward announcement, you may be able to write it yourself.

Printed Materials

Printed materials are your image: They reflect you, your firm and its services. A sloppily produced mailing piece will register negatively for the person who receives it. Make your piece as simple as it needs to be, but be sure it communicates well – that it says what you want to say, as well as you can say it!

- Write clearly and concisely
- Do not use technical vocabulary or jargon
- Be sure the piece is visually easy to read
- Strive for a clean, clear look with lots of white space
- Keep your message as short as possible
- Make your identity clear

Printed materials can mean anything from a simple 8½" x 11" typed sheet to a full-color book of 100 pages.

If you are not using a professional public relations consultant,
you can obtain advice from a local printer. A print shop or reproduction center can put you in touch with designers and, in many cases, an editor to work with you.

The types of print materials your organization produces will depend on your resources; some possibilities include:

**Responses to public announcements or ads** – These may consist of a form letter or additional literature. Each piece should be carefully prepared.

**Leaflets** – Fewer than eight pages, it can be one page, folded.

**Newsletters** – These can be two, four, eight or more pages. Since these are usually produced on a regular basis, it is best to have professional editorial help.

**Booklets, brochures** – Small publications to set forth your firm's history and services, employment opportunities, etc. 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 written portion has been completed, either by yourself or another writer, you can seek the services of a graphic designer who will design the piece with you. (If it is a simple, straightforward one-page piece, your local print shop can suggest type styles and can help design it.) The small investment in a professional artist can make a big difference in the appearance of your printed material.

Consult your local classified telephone directory for the help you need or get in touch with your state society or local chapter. It produces materials of all types and can put you in touch with the appropriate writers, printers, etc.

Audio-Visual Materials

A wide variety of visual materials are available, from photographs to a fully produced film. They are effective to illustrate a speech or to tell a story by themselves. Consult your local directory for producers of such materials. If there are none in the immediate vicinity, your local radio or TV station may advise you. A local photographer may be available through the community newspaper. Explain the assignment and determine the rate, which is generally for the time the photographer works on the assignment. Development of prints is an extra charge. Rates can vary greatly, from $50 to $200 per hour. If you use an individual photographer regularly, you may be able to get a special rate. Also, the photographer will learn your needs and take the shots you need quickly and unobtrusively.
Producing Your Own PR Materials

Other visual possibilities include:

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

Slides are a useful accompaniment to a speech and probably the simplest and least expensive visual. Film designed for transparencies is obtained easily, and any photo lab can handle the processing and mounting of slides. If you plan a slide show, it is usually helpful to supply an accompanying script.

In producing film or 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.

In producing materials that require sound accompaniment, such as film or videotape, you will note that there are now many independent producers to choose from. If taping, photography or filming is to take place at a particular site, it is important for the producer to visit ahead of time to assess conditions such as lighting and electrical facilities or physical restrictions. This will ensure that appropriate arrangements can be made for the best professional result.

Professional PR Help

If you plan an ongoing 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 professional advice, removing the responsibility from your shoulders. This person also becomes acquainted with your business and its needs and can become a valuable resource for you. You can obtain these services on either a retainer basis or on a per project basis. Discuss with the individual your plans, what will be required and the best way to work together.
Planning a Special Event

A special event can assure a measure of publicity in the community (and perhaps the surrounding region). Special events can include:

- an anniversary celebration
  *(your organization's 25th year in business in your city)*

- an award presentation
  *(for dedication to public service)*

- an annual program
  *(award of annual scholarship to high school senior planning to study accounting)*

- sponsorship of community event or benefit
  *(sports event, the proceeds to benefit a scholarship fund or local charity)*

- a speech by a noted personality
  *(usually for a charity or fundraising event)*

Special events require a good deal of advance planning and attention to detail. Start planning as early as possible. Recruit help. And allocate a realistic budget.
**Planning a Special Event**


The same basic principles can be applied to your planning as for news releases:

- **WHO** is sponsoring the event?
- **WHO** will attend?
- **WHO** will speak or entertain?
- **WHO** will benefit?
  (and **WHOM** do you have to call first?)

- **WHAT** is the event?
- **WHAT** is its purpose?
  (**WHAT** can you do to promote it?)

- **WHERE** will the event take place?
  (**WHERE** should it be publicized?)

- **WHEN** will the event take place?
  (**WHEN** should you begin publicity?)

- **WHY** is the event being planned or sponsored?
  (**WHY** should the media be interested?)

- **HOW** shall we plan this successfully?
- **HOW** to reap maximum benefit.
  (**HOW** do we assure good media coverage?)

No mean task!

**When?**

Set the date and time. The larger the event, the more planning time should be allowed, and the more help you need. (It is best to use experienced professionals in planning a large event.) For a major community activity, for instance, you may need six months or more to get everything in place. At any rate, even a small or limited activity should be planned six to eight weeks ahead.
Planning a Special Event

Who?

Once you decide when, you can determine who will attend, and how many. The answers will affect the next step: Where will the event take place?

Where?

— a conference room
— a hotel meeting room
— a private club
— an auditorium (determine seating capacity and equipment)
— a restaurant (private room or the whole place)
— an outdoor facility (schoolground, public recreation area)

The smaller the event the easier it is to pull together. A phone call to a corporation in town to borrow its conference room carries fewer details than staging an outdoor sports event involving large numbers of people for several hours.

As soon as possible, reserve the necessary space. Set up an appointment with the person in charge of the facility to discuss your needs, and take at least one other person with you to the initial meeting to provide backup. If possible, assign the project to a staff member or, still better, use the services of an outside public relations aide who can deal with the many details.

What?

What or who is your main attraction? If it is a noted speaker or personality, he or she must be booked well in advance and arrangements worked out ahead of time. A day or two before the event, double-check all arrangements and reconfirm these with the speaker.

Who will be in the audience? If it is a business or professional event, is the program of broad enough appeal to invite others? A broader audience affords additional opportunities for promoting the event.

Special Equipment

Will you need special equipment for the program? A sound system? A screen for films or slides? Audio-visual equipment? Flip-charts? Special marking crayons? Can the facility provide it or is that your responsibility? If it is, check into the rental of such equipment. The evening before the event, double-check everything to be sure all are in working order.
Planning a Special Event

The day of the event check to see that the room is set up properly for seating; that equipment is in place; that lighting works. Checking details can mean the difference between a smooth operation or a makeshift event. (Has the award certificate arrived? Is it correct?)

"The Best-Laid Plans..."

Murphy’s Law is always operative. No matter how smoothly you have planned and double-checked arrangements, something may go wrong. Your speaker’s plane may be delayed; the plaque may not have arrived from the engraver’s; a short circuit may inflict a blackout in the auditorium; there may be a major distraction in the community that will divert the press away from your event.

It’s not possible to provide an alternative for every possibility. If you can remedy the situation, of course do so. If you can’t, don’t panic – don’t let it ruin the entire event.

Media Arrangements

Releases inviting the media to special events should be one page, typed with wide margins. Use the who – what – where – when format so that the information is immediately clear. Indicate photo possibilities. If the event is not in a well known location, include travel directions.

Example:

Event: _______________________________________

Purpose: _______________________________________

Speakers or Program: ___________________________

Where: _______________________________________

When: _______________________________________

Photo Possibilities: ___________________________

One way of capturing interest: If your event is an anniversary or charity benefit, include a photo with your release showing the result of funds contributed last year. (For instance, if you raised $5,000)
for special equipment for the hospital, a photo can show how that equipment is being used. This is excellent for advance publicity for your event.)

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**The Big Day**

Early on the day of the event, assign someone to make a follow-up call to the media people who have been invited. (If you know that a reporter does not like to be called, don't call.)

The writer or broadcaster may tell you he or she does not plan to be there. Don't try to persuade a change of mind. Offer to provide a follow-up story, background material and photos. Ask when it will be needed, and be sure it arrives on time.

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**Media Arrangements**

Will the media want to interview the speaker or any of the guests afterward? Arrange this ahead of time and see that the guest is in the proper place at the appointed time for interviews or special photos.

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**Press Packet**

A press kit or packet of materials can provide all the information for a good story and all the data that was too long to put into a press release. This packet, to be distributed to attending media, might include:

- a basic one-page release
- a longer version with more detail and support data
- background material on history of the event if it is an annual activity
- photos – of the speaker, participants, or other aspect of the event
- a copy of the speech or excerpts and a brief biography of the speaker
- brief biographies or background data on other participants
- information on your organization
- any other pertinent material that will help to provide a good story
- small useful souvenir items (pens, pads, etc.)

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**After the Event**

Send follow-up news releases and photos. These will contain excerpts of any speeches, and a summary of the event. (Taping speeches allows you to excerpt quotes.) If there were visual materials that are easily reproduced for TV, you can include these.
Reference Sources

A number of books have been written about public relations covering every aspect of the art. Many are interesting and make good reading.

The following directories are a good place to begin:

Weiner, Richard
A compilation and description of public relations books, services and products.

Weiner, Richard
A work manual with practical tips and guidelines.

GENERAL BOOKS ABOUT PUBLIC RELATIONS, PUBLICITY, PUBLIC AFFAIRS

Black, Sam and Sharpe, Melvin

Cole, Robert

Fraser Associates

Helm, Heibert, et al.

Kadon, A.

Leiding

Lewis, H.G.

Marston, John

Reilly, R.

Yale, David

BUSINESS/PROFESSIONAL

Betancourt, Hal

Goldhaber
**Reference Sources**

**WRITING/STYLE**

Bernstein, Theodore M.  

Douglas, G.  
*Writing for Public Relations*, Merrill, 1980.

Flesch, Rudolf  

Newsom and Siegfried  

Roman and Raphaelson  

Safire, William  

White, E.B.  

Zinsser, William  

**MEDIA DIRECTORIES**

*Ayer Directory of Publications*  
Newspapers; trade and consumer magazines; newsletters.

*Burelle's Media Directories*  
Local media directories including newspaper contacts and circulation. Radio/TV listings give format and special programs, including cable.

*News Bureaus in the U.S.*  
Richard Weiner, Inc.

News bureaus; magazines, newspapers; wire services.

A comprehensive bibliography, updated annually, is available from the Public Relations Society of America, Information Center, 845 Third Avenue, New York, NY 10022.

**SERVICES**

PR AIDS / Party Line  
A weekly newsletter on media placements. Describes current needs for material in consumer and trade press – newspapers, magazines, radio and TV.