



## **A Solution to the Marketing vs. Sales Conundrum** ***ConvergenceCoaching and the Association for Accounting Marketing Help CPA Firms Define Roles***

**For Immediate Release**

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**Bellevue, NE, March 25, 2010** – As dedicated marketing and sales professionals increasingly supplement the partners and managers in generating new clients and engagements, a question emerges: “What marketing and sales roles do we need and when?”

The Association for Accounting Marketing, in collaboration with ConvergenceCoaching, developed a white paper to address this issue. [“Marketing and Sales Roles in Accounting”](#) aims to answer these burning questions:

- What marketing and sales roles do we need?
- How and when do we fill them?

This 11-page document is intended to answer this question and provide guidance regarding the various marketing and sales roles a firm may have, how these roles may be measured and the timing you may consider when adding these positions in your firm to achieve your business development goals.

“We are so pleased to provide this valuable resource to help accounting firm leadership identify and define the duties and responsibilities for their current and future marketing and sales roles. This document also provides concrete ideas for measuring the success of these personnel, which until now, has been difficult to find combined in one document,” said Julie Tucek, president of the Association for Accounting Marketing. “We plan to expand the scope of



the white paper in the future by including compensation considerations from an upcoming survey that the Association for Accounting Marketing will conduct to gauge marketing and sales compensation trends among members.”

“In this economy, growth is critical to the success of any business. CPA firms recognize the need to increase their commitment to marketing and business development by dedicating resources to these functions,” said Tamera Loerzel, partner of ConvergenceCoaching. “This white paper is intended to help firms define those responsibilities and ensure someone in their firm clearly owns each.”

The “Marketing and Sales Roles in Accounting” white paper can be downloaded for free at [www.accountingmarketing.org](http://www.accountingmarketing.org). For more information about the Association for Accounting Marketing, visit [www.accountingmarketing.org](http://www.accountingmarketing.org).

### **About ConvergenceCoaching, LLC**

ConvergenceCoaching, LLC is a leadership and marketing coaching and consulting firm whose mission is to help CPA and information technology (IT) firms and professionals achieve success. As a completely virtual organization of 11 full and part-time people, they achieve their mission by helping their clients “get real” about their organizational constraints and market opportunities and then guiding them as they develop and implement action plans to address those areas. For nearly ten years, the firm has offered a range of personalized assessment, planning, retreat facilitation, training and implementation services that include:

- Leadership and cultural coaching
- Succession planning
- Human resources and organizational optimization
- Revenue growth and niche development
- Market positioning, branding and lead generation



- Sales process definition and training

They also provide a variety of soft skills training and development programs to people at all levels via in-firm events, live web seminars and online self-study.

For more information about ConvergenceCoaching, visit their web site at [www.convergencecoaching.com](http://www.convergencecoaching.com), their blog at <http://blog.convergencecoaching.com> or their Learning Center at [www.convergencelearning.com](http://www.convergencelearning.com).

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