



### **Accounting Firm Client**

*"The firm was discouraged by the lack of engagement of our Young Professionals in a professional services environment. Daily work had eroded mentorship in a way that was leaving the organization unprepared for the future. The Dots Grow methodology lead us to create a presentation to advise our leadership team on market changes and generational awareness. Our firm then worked with marketing representatives and the local community to win a Young Professional's Award for the firm. Our firm had an excellent reputation, but we were not relating our accomplishments effectively in today's market. Once we engaged the Dots Grow platform, we were able to see what the next generation of workers and clients needed to feel comfortable working with our firm."*

2008 Financial services client

#### **The Dilemma:**

Young Professionals within the firm were not engaging with other young professionals within the firm and outside in the community to build new business. The Leadership Team was baffled by the fact that the firm's Young Professional teams were not motivated to follow legacy procedures and activities to gain new clients.

#### **The Solution:**

At the direction of the Dots Grow platform, the firm began to survey and produce focus groups and interviews with young professionals within the firm and in the community. Firm leadership learned about generational expectations, new marketing avenues, and internal strengths which were not being relayed to the community. Firm messaging was designed to meet the needs of the young professional populations and relayed through an updated logo and website. The Young Professional team at the firm was provided with a series of training sessions to introduce new messaging. Select high performing young professionals in the firm were asked to share experiences with community members in the judging for a YP community contest. Others in the Young Professional team were asked to provide input for the logo and website redesign. Additional training was offered to allow the Young Professionals to engage with

community members and firm leadership, providing a natural mentorship opportunity on a regular basis.

Results:

- ✓ The firm won the Young Professionals award in the community and was able to market their success to recruit more qualified young professionals.
- ✓ The Young Professional team at the firm was valued and utilized to prepare new messaging and media presence to gain new clients, thus encouraging leadership qualities for the future of the firm.
- ✓ Dots Grow provided the platform for an ongoing training program to engage young professionals and firm leadership, while relating to the changing demographics in the community.
- ✓ Target markets were presented with a fresh new look at legacy success of the firm.
- ✓ Firm leadership was engaged and presented with a clear path of understanding in how to bring in new business in changing market.