

Budget Benchmark Study

Q1 First, tell us about your firm.

Firm Name

Number of Offices (including related entities)

Number of Equity Partners (including related entities)

Number of FTE (Full-Time Equivalent) employees, including all professionals and support staff

Number of FTE employees dedicated to your firm's marketing function

Q3 Which of the following best describes the service offering of your firm? (select all that apply)

- Tax Services
- Valuation
- Human Resources/Staffing
- Software/Technology
- Legal
- Business Consulting
- Wealth Management
- Information Security
- Audit/Assurance
- Insurance
- Actuarial

Q4 What is your firm's annual revenues for each of the past three years?

Reminder: all information provided is confidential. Revenue information is essential to calculating growth rate, an important component of this study.

No responses will be attributed to your firm. Results of this study will be summarized in aggregate.

If you do not have access to this information right now, you can save and resume your progress. If you close out of this window, you can resume by clicking on the link that was provided to you.

	2016 - FYE Actual (\$USD) (1)	2017 - FYE Actual (\$USD) (2)	2018 - FYE Actual (\$USD) (3)
Combined annual revenue of your firm and related entities <i>(Please use \$USD)</i> (1)			
Revenue attributed to mergers and/or acquisitions in this fiscal year (2)			



Q5 What percentage of your marketing budget do each of the following business units control?

	Firm-Wide/National Level (1)	Regional/Local Level (2)	Practice Area (3)
% (total must equal 100) (1)			

Q8 Accounting firms set their marketing budgets differently. Depending upon a firm's budget philosophy, items below can be included in the marketing budget, accounted for elsewhere, or not used at all.

For this question, please indicate which of the following items below your firm has made an expense to within the past fiscal year.

This survey will reference your responses in follow-up questions.

- Compensation for marketing department** *(including salary and bonuses. This category should include all internal staff dedicated to marketing. Excluding benefits. Please exclude internal marketing staff compensation from all other items going forward with this survey)* (1)
- Internal Education and Training** *(Including cultural branding, marketing and sales training; does not include meals or continuing professional in accounting topics.)* (2)
- Charitable giving** *(including donations and sponsorships of events/activities that are charitable in nature; does not include sponsorships of marketing related events)* (3)
- Political Contributions** *(including donations and campaign partnerships)* (4)
- Professional Association Memberships/Dues** *(e.g. client industry trade associations, does not include event registration costs and those tied to employee credentials, e.g. AICPA)* (5)
- Dues** *(e.g. country club memberships, Chamber dues, Rotary club, etc.; does not include event registration costs)* (6)
- Networking Events** *(e.g. Chamber of Commerce event registration fees, breakfast/lunch/dinner events, cocktail hours, including personal meal expenses and travel costs, etc.)* (7)
- Entertainment Events** *(including ticket and/or suite costs, travel costs, personal meal expenses, etc; does not include internal firm events and parties)* (8)
- Giveaway and Gifts** *(including promotional materials, e.g. pens, mugs, branded apparel, holiday cards, client gifts, etc.)* (9)
- Individual Partner Budget Set-Aside for Business Development** *(funds dedicated for partners discretionary use)* (10)
- Trade shows** *(including travel, event attendance fees, exhibiting, trade show advertising, trade show sponsorships, etc.)* (11)

- Sponsorships** *(Any event that could be leveraged for marketing or business development purposes, events, awards, titles, etc. such as sponsoring a golf event or sponsoring an industry award; does not include tradeshow sponsorships and sponsorships of charitable events.)* (12)
- Conducting In-Person Seminars and Other Educational Events** *(Any event that is purely for educational purposes and does not have business development connotations; includes travel, meals, etc; does not include internal educational events or training of staff or employees)* (13)
- Conducting Webinars or Other Online Educational Events** *(Any event that is for educational purposes; includes software costs, promotion costs)* (14)
- Website Expenses** *(Including maintenance and redesign, hosting etc. does not include salaries)* (15)
- Pay Per Click Advertising (PPC; including outside vendors)** (16)
- Search Engine Optimization (SEO, including outside vendors)** (17)
- Email Marketing** *(including email template design, outside vendors; does not include list purchasing and newsletters)* (18)
- Newsletter/Syndicated Content** *(Including print and electronic newsletters, including content purchasing e.g. CCH, PDI; design and distribution)* (19)
- Marketing Automation/CRM Software** *(e.g. Salesforce, Hubspot, email software, etc.)* (20)
- General Purpose Software Not Covered Elsewhere** *(including licenses and subscriptions, e.g. Adobe Creative Suite, Think Stock, Survey Monkey)* (21)
- List Purchasing** *(Including purchase or rental of mailing lists, databases, outside vendors)* (22)
- Social Media** *(including training, software, outside vendors, and promoted social media posts)* (23)
- Marketing Video Production** *(Including outside vendors, does not include videos for internal use only)* (24)
- Print Advertising Expenses** *(does not include conference / tradeshow advertising)* (25)
- Television and radio advertising** (26)
- Outside Copywriting Expenses / Content Creation** *(Including company blog, white papers, etc.)* (27)
- Publishing** *(Including books, magazines, other major publications, including electronic and print versions)* (28)
- Marketing materials** *(including brochures)* (29)

- Outside Consultants, Agencies, or Freelancers** *(Including design expenses; does not include any services you have listed elsewhere.)* (30)
- Public Relations** *(Including press release costs, agency fees, including distribution tools and PR Software)* (31)
- Research** *(Including brand research, market research, client satisfaction surveys, etc.)* (32)
- Outsourced Telemarketing** (33)
- Other Online Advertising (Non Print/Adwords)** *(Including banner ads, pop-ups, etc.)* (34)
- Client Loyalty Program Rebates and Awards** (35)
- Internal Firm Events / Parties** *(Including internal firm events, anniversary parties, company retreats, meals and drinks.)* (36)
- Photography** *(Including portraits, headshots, stock photos, and photographer expenses.)* (37)
- Direct Mail** *(Including stamps, envelopes, print costs; does not include list purchases.)* (38)
- Other (Please Specify) (39) _____

Q7 What was the total dollar amount allocated to each of the categories you identified in the last fiscal year and most current fiscal year?

Please provide a dollar amount, even if the item is not included in your marketing budget.

	Fiscal Year Ending 2017 (1)	Fiscal Year Ending 2018 (2)
Identified marketing technique(s)		

Q9 Of the items you selected, please identify which expenses were included (or not included) in your firm's marketing budget for the most recent fiscal year.

	Yes - This expense is included in the marketing budget (1)	No - This expense is not included in the marketing budget (2)
Identified marketing technique(s)	<input type="radio"/>	<input type="radio"/>

Q10 For the items you selected, please indicate if you would like the amount budgeted on each of the items to increase, decrease or stay the same next year.

	Increase (1)	Stay the same (2)	Decrease (3)
Identified marketing technique(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q11 Please briefly describe any specific marketing programs you've implemented at your firm that have worked especially well. Provide specific details, including ROI, if available.
