

2026-2027



HHM Marketing Rewards

A guide to the HHM Marketing Rewards Program.

HHM



Why Should I Participate?

In addition to the personal sense of accomplishment, when you hit your quarterly goal, you'll earn a gift certificate to a local restaurant, retail store, or Amazon. At the end of the year, each HHM employee who met at least 3 out of 4 quarterly goals will be rewarded with a weekend trip for two. **Need more incentive?** A leaderboard by level will be unveiled monthly and the top earners will get an ADDITIONAL gift card prize! Employees may appear on the monthly leaderboard no more than two times during each Marketing Rewards year. Gift cards should be distributed 4 weeks (or 28 days) following submission date.

Who Can Be a Good Marketer?

Everyone at the firm, from administrative positions and technical professionals, to the partner level, has the opportunity to serve as brand ambassadors for HHM. **Every employee can embark on an exciting marketing journey** by making an impact in our community and championing HHM with help and resources available every step of the way.

How Do I Get Started?

HHM Marketing Rewards is designed to give you a quarterly marketing playbook to help you generate quality ideas worthy of your time. The focus is not on obtaining clients, but rather, developing the technical and soft skills that will serve you well in the long term.

Where Are the Rules?

Each marketing activity will be rewarded with a marketing point or points, depending on what the activity is. Suggested activities to earn points can be found at the end of this document.

Activities not accounted for already in the form cannot be typed into the description box - those points are not counted unless a member of the marketing team or Travis Horton approves it. Please instead use the description box to describe your activities you have selected on the form.

Points will be calculated and submitted based on a standard quarter schedule (i.e., January-March, April-June, July-September, October-December).

Points are due on the following dates representing your activities for the previous quarter: January 10, April 20, July 10, and October 10. You must meet the quarterly point goal for **three out of four quarters** (Q3 and Q4 of the previous year and Q1 and Q2 of the current year) in order to qualify for the trip. Points should be submitted no later than the due date. **Late submissions are no longer accepted.**

Quarter	Submission Dates	Final Due Date
Q1	January 1st – March 30th	April 20th
Q2	April 1st – June 30th	July 10th
Q3	July 1st – September 30th	October 10th
Q4	October 1st – December 31st	January 10th



New 2026 Minimum Requirement

For employees from Staff Accountant through Partner who wish to participate in the program, eligibility for the Marketing Rewards trip now requires meeting minimum quarterly point requirements in both required categories during all four quarters:

- Business Development: at least 10 points per quarter
- Thought Leadership / Technical Skills: at least 10 points per quarter
 - Examples of Business Development activities include prospect and referral coffees or lunches, networking events, and new client development.
 - Thought Leadership and Technical Skills activities include writing articles, assigning articles, reviewing articles, webinars, speaking engagements, CPE, and presentations.

How Many Quarterly Points Do I Need for the Rewards?

Title	Points Goal
Administrative	10
HHM Bookkeeping	10
HHM Wealth	20
Staff Accountant, Senior Accountant, Supervisor, Dealership Specialist	25
Manager & Senior Manager	50
Director & Partner	75

Top Five Reasons to Participate

For the Firm and you! HHM encourages and prioritizes our staff to build his or her marketing skillset and be involved in the community.

- Career development – great leaders are great marketers. Think and act like a leader.
- Honing your technical skills – nothing sells professional services like the professional who provides the service. You know your stuff – go show it!
- Make friends and lifelong connections in various industries – you never know who'll you might connect with
- Make a positive impact on your community
- Build referral relationships

Not to mention the prizes, luncheons, and rewards.

How Do I Know if Someone is Looking for our Services?

Our clients do not buy our services on our time schedule. They buy them on theirs. That is why it is so important to build and maintain those relationships. Ideally, through your marketing efforts, you will catch prospective and current clients when they are ready to engage HHM for services or expand what they currently engage the firm for.

Do I Market to Current Clients?

First, we need to make sure we are taking care of our current clients. It's much easier to maintain a client than get a new one. Make sure you're prioritizing your current clients through personal outreach, finding additional ways to serve them, and overall making them feel valued as a client.

But our current clients are also our best source for new clients. A positive word-of-mouth recommendation from an established client to a prospective client goes a very long way. If you have a good relationship with a client, ask him or her to introduce you to other potential clients. Whether through email, a phone call, or at an in-person event like a Chamber function or industry conference, you can propose several ways for a current client to introduce you to others.

By engaging with our current clients, you also have the opportunity to expand upon the services the firm currently provides a client which is known as cross-selling or up-selling. Maybe we have a current tax client who has found themselves in need of business valuation services. This is a perfect opportunity to cross-sell additional firm services. Bottom line - relationship management is a skill that CAN be learned. It takes practice and persistence.

How Do I Cross-Sell or Provide More Value to a Client?

First priority is to stay in touch with clients and make them feel appreciated. Call them; take them to breakfast or lunch; visit them; invite them to a social gathering; email them. And when you have those interactions with clients, talk to them about how business is going. Use the following to help guide your conversations:

- Pinpoint their priorities – ask clients what they want for their businesses and see if there are ways you can help. Maybe this is offering additional services you or your team could provide? Maybe this is offering other firm services like valuation or litigation support or from an affiliate company like Wealth or Bookkeeping Solutions (cross-selling)?
- Discover client pain points – ask clients what things are holding them back in their business goals and offer ideas then or later that could ease these pain points. This is a great opportunity to cross-sell other services within the firm. If a client needs better bookkeeping support, introduce them to someone at HHM Bookkeeping Solutions.
- Find a way to help them win – when our clients win, we also win. Be a creative problem solver and help clients find ways to win. Note, these suggestions might not be something that HHM provides, but if you provide a referral or recommendation that helps a client, they will remember that.



HHM's Growth By the Numbers

- 1 Firm with 4 Locations
 - Chattanooga
 - Memphis
 - Cleveland
 - Pensacola
- 4 Companies with 1 Vision
 - CPAS & Advisory
 - Wealth Management
 - Bookkeeping
 - Talent
- Top 100 CPA firm
- 3rd Largest CPA firm in Tennessee

HHM SERVICES:

- Tax
- Audit
- Accounting and Assurance
- Accounting Software Services
- Business Valuation
- Emerging Business and Startup Services
- Estate Planning
- Fraud Investigative Services
- Healthcare Advisory Services
- International Tax
- Litigation Support
- Management Advisory
- Peer Reviews
- Personal Financial Planning
- SALT (State and Local Tax)
- TaxCaddy
- Tax Planning
- Employee Benefit Plans

HHM WEALTH:

- Financial Planning and Consulting Investment Management
- Retirement and Life Planning
- Everplans
- Transition Planning and Business
- Succession
- Estate and Family Planning
- Tax Minimization Strategies
- Retirement Plan/401k Consulting
- Nonprofit Portfolio Management
- Insurance Services
- SmartVestor

HHM NICHEs:

- **Advisory**
- Construction
- Dealerships
- Electric Service Distributors
- Financial Institutions
- Governmental
- Hospitality and Restaurants
- Logistics
- Manufacturing and Distribution
- Not-For-Profit
- Real Estate

HHM BOOKKEEPING SOLUTIONS

- Accounting and Bookkeeping
- Services
- Indirect Tax Reporting
- Internal Training and Development
- Special Projects
- (i.e. automated bill pay and invoicing)

What About Referrals, Clients, and Prospects?

Historically, referral sources have been responsible for 70% of the firm's new business. Developing good referral sources is one of the most important things you can do for your career. Once you have the relationship, make sure you continue to cultivate the relationship and you give them referrals as well.

I've Reviewed the Program, but I still Need Help Getting Started. What Do I Do?

You do not need to go on this marketing journey alone! You have a team of people to help. First, reaching out to your team leader for ideas of where to get started (or content topics) is a great first step.

The marketing team is here to help one on one as well. Need to brainstorm a creative gift idea to send to a prospect? Need help crafting the right message for a follow up meeting card? Want to be a better content creator on LinkedIn or Twitter? The marketing team is here to assist, but you've got to ask.

PMPs are also available to any team member that would like more assistance. Using the Marketing Rewards Program as a guide, the marketing team will help you craft a plan to not only maximize the program but also help you grow your personal and professional brand. Interested? Email our Director of Marketing if this is something you want to learn about, and we'll get you started on a personal marketing plan.

HHM is full of seasoned professionals who know how to market. Ask the individuals you see doing a great job with marketing how he or she does it.

