

MARKETING BEST PRACTICE

A PERIODICAL UPDATE - ISSUE 13

*Win new business in
an effective way...
UHY's new 'Winning international
pitches' tools and guidance ...*



This is the 13th edition of the business development and marketing resources covering marketing, branding, business development and PR best practise resources, ideas and tools with a specific focus in this issue on network data/ranking and the new UHY 'Winning International Pitches' tools and guidance.

These materials and links have been created to help you:

- Assess best practice business development and marketing
- Extend your current activities and/or reinvigorate your marketing and business development programmes
- Provide input for the personal development of all your staff members
- Encourage a positive approach to business development and marketing internally
- Maximise the benefits to be gained when using external business development and marketing specialists.

I hope you find the selection of materials and resources useful and please do not hesitate to share your comments and/or send me new ideas, tools and research websites you have found valuable for your firm. Please also let me know what materials we could develop for you or topics you would like to see covered in future issues.

Enjoy the reading and implementation.

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Issue 13– Content



The below listed links are mainly intranet or UHY Brand Centre-based and you will need to be registered and logged-in for the links to work. For access to the www.uhybrandcentre.com: username: uhy, password: brandcentre

NETWORK COVERAGE AND RANKING

UHY derives its global network ranking following the International Accounting Bulletin (IAB) survey. The IAB continues the distinction introduced in 2008 between a 'network' and an 'association'. 27 of the 52 participating organisations in this year's IAB survey categorised themselves as a 'network'. From 2015 onwards, UHY will communicate only its global network ranking, as a new approach to entice further our external audiences. The reasoning behind this new approach is outlined further in this report: [A full analysis and commentary on IAB's global survey and internal member firm annual reporting](#). For internal purposes, UHY continues to evaluate the amalgamated data of networks and associations to give a more complete and meaningful competitor analysis.

NETWORK DATA

From 2015 onwards, UHY will be using only the network ranking for external marketing and communication purposes and member firms are required to adopt the same approach. All our marketing messaging should be aligned and promote, as a minimum, the following data about the UHY network throughout 2015:

| UHY NETWORK DATA 2014 | |
|-----------------------|----------|
| TURNOVER | USD 640m |
| STAFF | 7,669 |
| COUNTRIES | 89 |
| OFFICES | 296 |
| GLOBAL RANKING | 16* |

*** UHY ranks globally 16 in the top 25 networks table by fee income (inc. the Big Four).**

SUPPORTING MATERIALS TO SHARE WITH THE RELEVANT STAFF IN YOUR FIRM:

- [A PowerPoint presentation with high level network data](#) can be used externally.
- [A full analysis and commentary on IAB's global survey and internal member firm annual reporting](#) – for internal and external use. The internal commentary will give some further insights but **this information cannot be shared with external contacts**.

WHAT SHOULD MY FIRM DO NEXT?

For consistency throughout the network, members are required to ensure the most up to date network information is always included in all their marketing materials and should update annually:

- The relevant pages of your firm website
- Brochures, presentations and flyers
- External presentations and pitch documents to clients

The below listed statements are updated once a year by the UHY executive office when the latest network ranking data is published. In addition, the [UHY Online Brand Centre](#) and the [UHY 'Knowledge Share' section](#) on the UHY Intranet list a number of materials/templates containing example content for [presentations](#), [press releases](#), etc. All these templates (i.e. corporate brochure, tender template, etc.) on the UHY Brand Centre featuring UHY network data have been updated.

NETWORK MARKETING MESSAGING

SHORT VERSION:

[Firm name]* is a member of UHY. Established in 1986 and based in London, UK, UHY is a network of independent audit, accounting, tax and consulting firms with offices in over 296 major business centres across more than 89 countries.

Our staff members, over 7,660 strong, are proud to be part of the 16th largest international accounting and consultancy network .

Each member of UHY is a legally separate and independent firm.

The UHY network is a member of the Forum of Firms.

*UHY-only branded firms must include the firm's country and legal description to ensure clarity in relation to the UHY network identity. For example: UHY, a Malaysian partnership, is a member of...

LONG VERSION:

[Firm name]* is a member of UHY. Established in 1986 and based in London, UK, UHY is a network of independent audit, accounting, tax and consulting firms.

WE UNDERSTAND YOUR BUSINESS

Informed thinking, whatever your focus

Tap into our global knowledge: our services focus on our clients' requirements with a good understanding of their needs. We work in collaboration with our clients and other member firms to ensure objectives are achieved. We share our clients' aspirations and deliver customised, timely advice to help you make the right business decisions.

WE ARE CONNECTED

Consistent values wherever in the world you do business

It is the UHY culture that really makes the difference for our clients. Harness the power of our network to achieve your goals: we deliver because we know each other well, we know about each member firm's specialist sector knowledge, and we know about each other's individual expertise. But, more than that, we know each other as people through meeting and working together regularly internally and cross-border. Our commitment to quality is one of our network's main values — because it is so important to us, we strive to achieve this in everything we do.

GLOBAL SKILLS

Over 7,660 staff, 296 offices, 89 countries... one vision

The UHY network offers an exceptional competitive advantage — national capabilities enhanced by resources and attentive personal service with the capability to support major business centres globally. UHY people pride themselves on their ability to combine local knowledge with national, regional and international skills sets.

*UHY-only branded firms must include the firm's country and legal description to ensure clarity in relation to the UHY network identity. For example: UHY, a Malaysian partnership, is a member of...

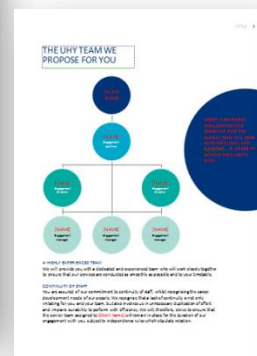
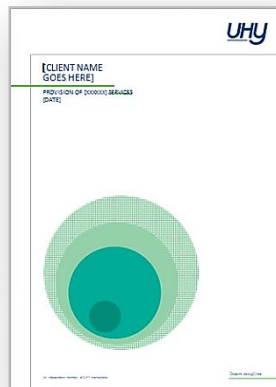
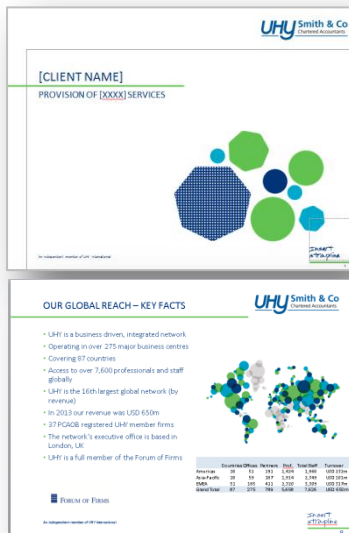
BUSINESS DEVELOPMENT

'WINNING INTERNATIONAL PITCHES' – TOOLS AND GUIDANCE

UHY is keen to support member firms win new business and help generate/originate referrals for cross border work through a concise and more unified UHY pitch* process. (*Also known as bids, tenders or proposals).

WHAT ARE THE NEW PITCHING TOOLS?

- **The Winning International Pitches Guidelines**
 - A practical 'manual' divided into six stages of the international pitching process
 - Guidance on best practices to take in each of those stages
 - **The supporting tools include:** checklists and other tools also available individually via the Intranet
 - An appendix with guides on pitching and doing business in key territories
- **Branded templates and guidance** for proposals and presentations



HOW DO I USE THE NEW TOOLS?



It is a must to download below and view [the training webinar](#) first to learn how to use the **'Winning International Pitches' guidelines, supporting tools and templates**. John Timperley, from The Results Consultancy, an external business development and training consultancy, and Dominique Maeremans from the EO guide you through the full set of tools.

Please encourage relevant staff involved in all aspects of the pitching to view the webinar, including staff taking strategic decisions to those involved in putting together the pitch documents and presentations.

Further follow-up sessions and regional workshops will be organised to support the adoption of the tools and guidance.

UPDATED PRESENTATION TOOLKIT – A GUIDE TO SUCCESSFUL PRESENTATIONS

The presentation toolkit has been updated with the 2014 network data and the new UHY branding. The [UHY Member firm presentation toolkit](#) contains example messaging and content guidelines about UHY. The content can be used and adapted when putting your own presentations together for potential new clients, contacts, etc. A full guidance document with best practice tips for presentations and how to use this PowerPoint template is also included. This toolkit can also be downloaded from the [UHY Brand Centre](#)

The toolkit also includes some general statistics which have been updated. See example below:

| 2014 regional summary | Countries | Offices | Partners | Prof. | Admin. | Total Staff | Turnover USD/M |
|-----------------------|-----------|------------|------------|--------------|--------------|--------------|----------------|
| Americas | 19 | 59 | 188 | 1,435 | 375 | 1,998 | 243 |
| Asia-Pacific | 16 | 63 | 185 | 1,934 | 270 | 2,389 | 93 |
| EMEA | 54 | 174 | 418 | 2,260 | 604 | 3,282 | 304 |
| Grand Total | 89 | 296 | 791 | 5,629 | 1,249 | 7,669 | 640 |

CLIENT TESTIMONIALS/CASE STUDIES LIBRARY

The above listed presentation toolkit also refers to client testimonials/case studies which can be found on the UHY intranet and can be used for insertion in marketing materials, presentations and pitches. The case studies have also been published in the [UHY Capability Statements](#). Link: [Client case studies library](#).

[A quick overview of the clients, sectors and services](#) covered in our case studies is also available.

CVS OF KEY STAFF AROUND THE NETWORK:

UHY hosts an intranet for the benefit of all staff of member firms. Member firms are encouraged to promote the participation of all staff on the intranet. If you are already registered on the intranet, it is important to complete and keep your personal profile up to date, including your biography and skills set. And don't forget your photo! This information is often used in a variety of ways by our member firms and the UHY executive office. Users in your firm can first register for access permissions using the 'Register for access link' in the bottom right of the homepage screen. Login details and a password are emailed directly to the individual once the registration process is completed. The UHY intranet can be accessed here: <http://intranet.uhy.com>.

FIRM PROFILE

Upon joining the network, each member firm is required to prepare a brief statement (usually around two pages) of basic contact details accompanied by information on capabilities, skills, sector specialisation, etc.

It is very important to keep your firm profile up-to-date annually as this information is used in a variety of ways, internally and externally: it can be added to multi-country pitch responses, for display on the UHY international website, etc. Your firm profile is available for download by the public from your firm's contact details section on the UHY website (visit www.uhy.com to view examples – see locations).

PUBLIC RELATIONS (PR)

UHY PRESS FACT SHEET:

A new 2015 version of the [UHY international press fact sheet](#) with updated network figures can be downloaded from the UHY Intranet. This can be used as an example to develop your own firm specific fact sheet. The UHY network press fact sheet is displayed on the '[Press Area](#)' of the UHY international website.

UHY INTERNATIONAL STUDIES:

Recent studies include:

- In-depth study on '[Private sector credit](#)' and supporting [report](#)
- International studies on '[Personal tax](#)' (released late autumn 2014) and the very latest on '[Capital Gains taxes](#)' attracted really great media coverage for many of our member firms.

Other international PR topics coming soon in 2015:

- Tax as a Percentage of GDP (re-run) to be release in March
- Air duty taxes in April/May

PRESS RELEASE TEMPLATES:

A [press release template](#) for local adaptation with guidance notes for editors has been updated with the current network information. The EO produces for each international release a template which can be adapted by member firms for local use and distribution amongst clients and business contacts. More PR materials can be found here: [PR](#)

UHY BRANDING

Please consult the [UHY Marketing Best Practice – issue 10](#), for an extensive Branding overview and guidance. Listed below are more recent developments.

“ The UHY brand is not just a logo. It is the overall experience we give our market place, our clients and contacts. It should reflect what we are about: our people, our reputation and quality assurance. This is what differentiates us from the competition... ”

STATIONARY AND MARKETING MATERIALS REVIEW 2014/15

Over the last few years, many of our member firms have dedicated a lot of effort to adopting the new UHY branding which has greatly contributed to a continuous effort towards strengthening our brand positioning in the market place. We are now conducting a review of member firms' stationery, website and marketing materials to assess compliance with UHY's branding requirements as outlined in the [UHY Branding Guidance](#). Especially the disclosure statement compliance requirements are of utmost importance – see page 29 of the guidance. All member firms, full and affiliates, were requested to participate in this review. The results of this review so far are showing great uptake and compliance adherence among member firms. A big thank you to all involved for all your efforts.

MINIMUM WEBSITE STANDARDS – COMPLIANCE REQUIREMENT

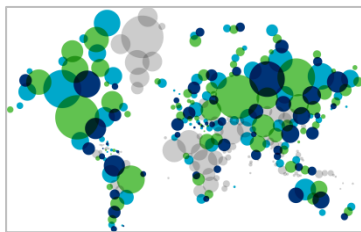
Later this month, the EO will start reviewing all member firm websites to ensure compliance with the minimum requirements, as outlined above. The minimum website standards for UHY member firms are referenced in the [UHY Branding Guidance on page 49](#). All UHY member firms are required to implement these standards.



The home page of both branded and non-UHY branded member firms should display the following official UHY branded network badge to promote a cohesive link back to the UHY network.

The badge should preferably be displayed in the footer and must be hyperlinked to the UHY website www.uhy.com. The new website templates already include this new requirement. The badge can be downloaded from the template section on the UHY Brand Centre.

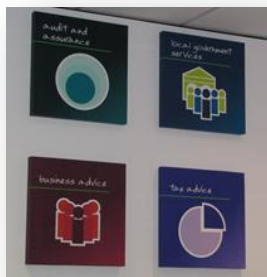
UHY GLOBAL MAPS



The UHY global maps have been updated to reflect the recent network expansion and can be downloaded from the [guides and graphics section on the UHY Brand Centre](#). **The map is available from the UHY Brand Centre** in different formats for various applications (png, eps, jpg, tif).

EXAMPLES OF MEMBER FIRMS' OFFICE BRANDING AND OTHER IDEAS

Showcases some great examples of how member firms have used the UHY branding and iconography in a creative way. Please feel free to share your own firm examples for inclusion. [An overview of branded examples](#)



OTHER MATERIALS

- **Corporate brochure templates** on the UHY Brand Centre have been updated with new maps and the network data. If you have previously used one of these templates then ensure your network data and maps are updated in your local documents.
- **Example branding:** All materials can be viewed in the ['gallery' section of the UHY Brand Centre](#).

BRANDING AND WEBSITE IMPLEMENTATION - HOW CAN WE HELP YOU FURTHER?

To support local implementation further, UHY are organising **quarterly branding conference calls** for the whole network. We hope all member firms will be able to attend at least one of the telcons, as it offers the opportunity to ask questions, get support, share ideas and keep up to date with recent and future developments. The full series of monthly branding conference calls will be held on the following dates:

- **Wednesday 18 March 12.00hrs GMT -**
- **Wednesday 24 June – 12.00hrs BST**
- **Wednesday 23 September- 12.00hrs BST-**
- **Wednesday 16 December – 12.00hrs GMT**

Please email Dominique Maeremans, d.maeremans@uhy.com with the name(s) and email address(es) of those staff members wishing to be involved.

PUBLICATIONS

UHY CAPABILITY STATEMENT 2015 – YOUR FEEDBACK REQUIRED!

The *UHY Capability Statement* is a well-received annual publication containing a number of client case studies. Client case studies are a very effective way to demonstrate the value of your services to clients and to demonstrate the way you work locally and internationally. Testimonials from existing satisfied clients are one of the strongest and most effective ways to establish credibility and trust with a potential new client. They are often used on websites, in brochures, presentations, pitches/tenders and other marketing materials.

The next edition will be published in October 2015 and is currently being developed. We very much hope we can count again on your valuable contributions in helping us develop some compelling stories. To help you get buy-in, both internally and externally (from the client), you may want to familiarise yourself with the process UHY has put in place to support member firms with the development of client case studies and testimonials. This [overview](#) outlines what this publication is all about: some key information about the publication and previously published case studies. In addition, I also include the [client questionnaire in Word format](#) for easy completion.

This year we are looking to include case studies on:

- **Transnational clients** – clients for which more than one member firm in the network provides services
- **Key clients for which your firm acts on a local basis** – preferably well-known names, possibly recognised internationally or regionally, irrelevant of sector
- **Clients involved in a specific sector**, if relevant to your firm
- **Clients with a strong story to tell** to support your service ethos

As a first step, please identify and share with us any clients that could make an appropriate case study for the next *Capability Statement 2016*, and all the necessary support will follow from us to help you throughout the process.

FREE PUBLICATION COPIES



UHY prepares [a number of publications](#) both on behalf of, and for, its member firms intended to demonstrate and promote the international character of UHY firms.

Don't forget that the UHY-branded folders (see example below) can be obtained from the EO. A template for member firm adaption is also available from the [UHY Brand Centre template](#) section.



All publications are provided to member firms free of charge, except for shipping costs. Publication quantities allocated to your firm are based on a firm's fee band, so the number of copies is intended, as much as possible, to be proportional to the size of the firm. All member firms are required to accept their allocation of publications. Extra free copies can also be obtained from the EO. To place an order, please email [Camilla Massara](mailto:Camilla.Massara@uhy.com), c.massara@uhy.com, at the UHY Executive Office.

A NEW SECTION ON FOREIGN DIRECT INVESTMENT TO SUPPORT YOUR FIRM'S DOING BUSINESS GUIDE (DBG)

FDI (Foreign Direct Investment) is a key performance indicator when investors consider starting operations in your country. So why should you strongly consider adding this information to your DBG? Your DBG can become an even greater marketing tool by providing information to potential investors on FDI inflow and outflow combined with the various incentives your country offers (tax cuts, grants, R&D, etc.). This approach will most certainly help to stimulate further interest in your firm's services too. The new section can be added when your current Doing Business Guide is due an annual update.

“ Did you know the UHY network has a presence on LinkedIn? You can join here: [LinkedIn: UHY Global Network](#) ”

FOR FURTHER QUESTIONS OR ASSISTANCE

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