



MEET THE FIRMS

Virtual Experience

CONTENTS:

FUNDING & ZOOM TIPS

PLATFORM CONTACTS

EVENT LOGISTICS

MARKETING GUIDANCE

MARKETING TEMPLATES

FLYER

METRICS

FUTURE CPA



WELCOME TO YOUR MEET THE FIRMS PLAYBOOK

This playbook was developed to help chapters easily create a successful **Meet the Firms virtual experience** and provide students the opportunity to:



- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers

This program is open to college and university accounting students interested in learning more about the accounting profession!

TXCPA

FUNDING & ZOOM TIPS

FUNDING



Because this program will be virtual, sponsors will not be necessary. However, sponsors may be a good source for prizes for raffles or incentives. TXCPA can also assist with giveaways for these events. Collect winners' names, email and mailing addresses for TXCPA to send the prizes via mail or email depending on the offering.

REGISTRATION



TXCPA can handle the setup of event registration through their central platform, Netforum. When you have your event date, time and details, please send them to Rori Shaw at rshaw@tx.cpa.

PLATFORMS

There are two platforms we recommend for hosting the Meet the Firms event; Zoom or Remo

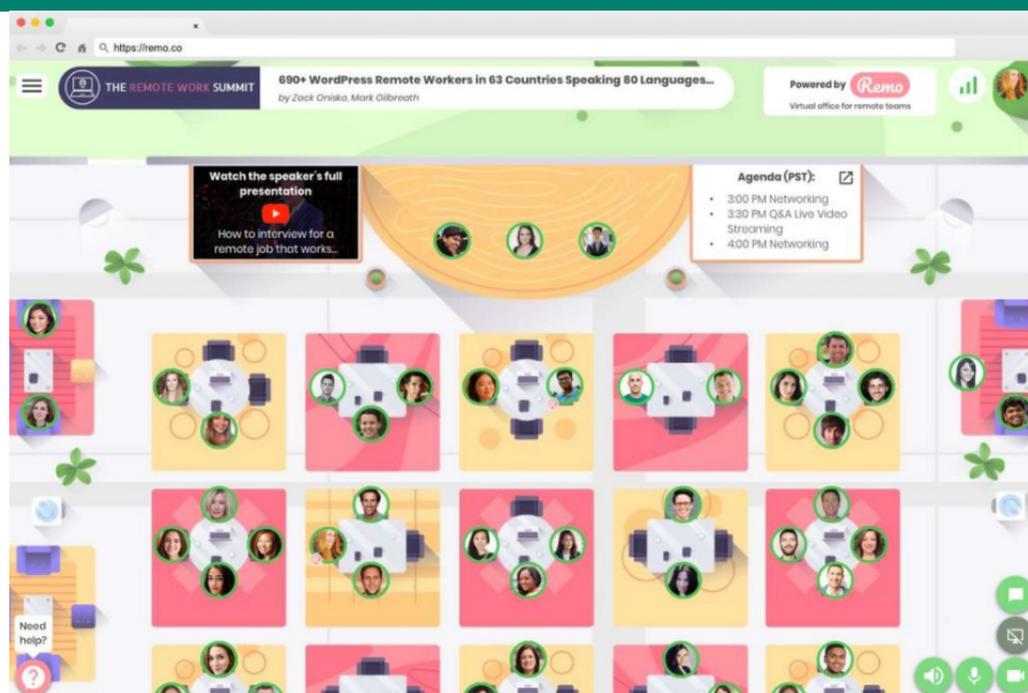


- Zoom can be used for Meet the Firms through the use of breakout rooms. Depending on how many students you have, you can break the students up into smaller groups for the breakout rooms. Then, you can have the firms rotate rooms every 15-20 minutes (or whatever timing makes sense for your event).
- If you don't have a Zoom account, please contact Rori Shaw at rshaw@tx.cpa to request access to a TXCPA Zoom account.



- TXCPA has a Remo account which would allow you to run your Meet the Firms' event through this platform. Remo is a virtual platform providing real-time, face-to-face interactions making virtual networking feel natural and fun. This would allow you to set up firms at different "tables" and the students could pick and choose which firms they want to virtually visit (over an allotted amount of time). Check out this [Remo demo](#) to learn more about the platform's features.

REMO CONTACT & ZOOM TIPS



Please contact Rori Shaw at rshaw@tx.cpa to access the TXCPA Remo account.

ZOOM TIPS



Host: If you use your own Zoom account, you will be the "host" for the event. You will have full control over the host controls such as starting a meeting, ending a meeting, recording, muting, etc. You are also able to give controls to a co-host (after you start a meeting). [Here is more information on host controls.](#)

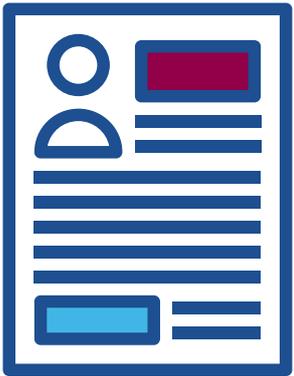


Record: Start "record" for each session for later playback or to offer for students on your website. You can select to "automatically record" every session in your account. [Click here for instructions.](#)



Breakout rooms: If you are going to offer breakout rooms, you will need to [enable them](#) in your account first. Once you enable them, you can [manage them](#) by creating them ahead of time or during the event.

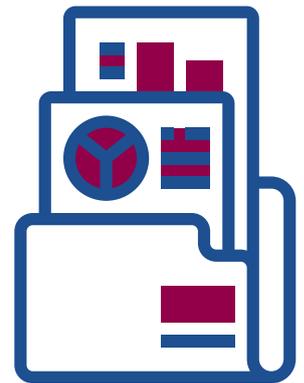
Resume Book:



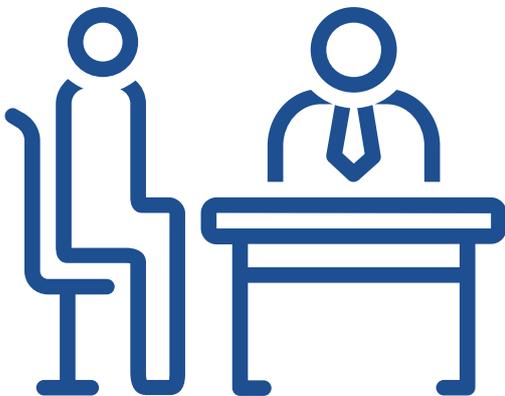
Students can submit their resumes and optional headshots so you can put together a virtual resume book for firms. Create a Google folder (or another sharing tool). Share the link with students and allow them to upload their resumes. Once all resumes are collected, send the link to your firm contacts prior to the event.

Firm Abstracts:

Request that the firms participating send you a firm abstract you can share with students prior to the event. [Click here for a sample firm abstract form](#). You can make a copy of this form and add any specific chapter content or additional questions prior to sending. Please be sure you make a copy and do not use the sample form above to collect your abstracts.



Sample Questions:



To ensure students and firm representatives feel comfortable, provide a list of sample questions and send it to them prior to the event. [Click here](#) for a list of sample questions.



Audiences:

- Students
- Educators/University Contacts
- Faculty & Campus Ambassadors (see list)
- CPAs/Firms

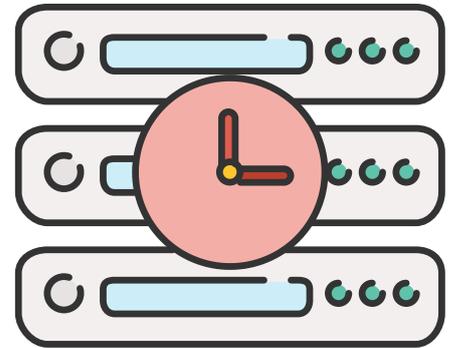
Mediums:

- Emails
- Flyers
- Social Media
- Word of Mouth



Timing:

- Save the Date announcement - ASAP
- Call for Member/Firm Participation - ASAP
- Announcement (6-8 weeks prior to the event)
- Reminder (2 weeks post announcement)
- Reminder (4 weeks post announcement)
- Optional Reminder #3 (6 weeks post announcement - if you have an 8-week promotion window)
- Final Call (week prior to the event)
- What you need to know (2-5 days prior to the event)
- Thank you for attending, reintroduce benefits of student membership and promote additional student offerings (following the event)



Student Save the Date (ASAP):

Email Header:



MEET THE FIRMS VIRTUAL EXPERIENCE

- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers



Subject: Mark Your Calendar to Experience [Insert Chapter Name's] Meet the Firms Virtual Event

Copy: Save the date to be a part of the upcoming Meet the Firms virtual experience scheduled for [insert date]! The event will provide an opportunity for you to take a closer look at what it means to be a CPA from leading CPAs in your community.

Mark your calendar now! More information on how you can join the event will be sent out shortly!

Social Post:

Mark Your Calendar: You're Invited to [Insert Chapter Name's] Meet the Firms virtual event on [insert date]. Stay tuned for more information soon!



MARKETING TEMPLATES

Educator/University Contacts Save the Date (ASAP) & College Ambassadors Save the Date (ASAP):

Email Header:



SPREAD THE WORD!

MEET THE FIRMS VIRTUAL EXPERIENCE

Invite students to:

- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers

The image shows a magnifying glass over a line of white paper figures, with one green figure in the center labeled 'FUTURE CPA'.

Subject: Save the Date: Students are Invited to [Insert Chapter Name's] Meet the Firms Virtual Event

Copy: Help us spread the word! Students are invited to join us virtually [insert date] to learn more about an accounting career and certification, while gaining insiders' knowledge from local CPAs and area firms. Students will be able to:

- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers

Mark your calendar now! More information on how students can be a part of the event will be sent soon! In the meantime, feel free to spread the word and send along this attached flyer [flyer can be accessed via the google drive] with more information.

MARKETING TEMPLATES

Member/Firm Participation Announcement ASAP:

Email Header:



Subject: Help Needed! [Insert Chapter Name's] Upcoming Meet the Firms Event

Copy: We need engaging CPAs and member firms like yours to take part in the upcoming [Insert Chapter Name's] Meet the Firms event. The purpose of the event is to give students an inside peek into the profession and area firms they may one day work for! Attendees will have the opportunity to meet and virtually mingle with local CPAs, hear more about career options, and have their resume included in a booklet to be distributed to CPAs. This program is open to area college and university accounting students interested.

Please contact [insert chapter contact information] if you would like to be one of the amazing CPAs and/or firms to be a part of this event and meet the future of the profession. If you know of students or interns who could benefit from this experience, please encourage them to sign-up [insert registration link]!

Attached is a flyer with more information on the event for reference. We hope you can be a part of this one-of-a-kind experience.

Social Post:

Be a part of our upcoming Meet the Firms virtual event and meet the future of the profession. If interested, contact [insert chapter contact info].



Student Announcement (6-8 weeks prior to the event):

Email Header:



MEET THE FIRMS VIRTUAL EXPERIENCE

- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers



Subject: Sign-up Today for [Insert Chapter Name's] Meet the Firms Virtual Event

Copy: Join us virtually [insert date] to learn more about your future career and gain an insider's view into the world of a CPA from those who know it best! As a part of the event, you will walk away with tools and personalized experiences to ensure you are future-CPA ready, while meeting with local CPAs and firms who might offer you a job one day!

Don't delay! Sign-up for this one-of-a-kind experience today!

Social Post:

Gain an insider's view of the world of a CPA from those who know it best and network with potential employers at the upcoming [Insert Chapter Name's] Meet the Firms event on [insert date].



MARKETING TEMPLATES

Educator/University Contact & College Ambassador Announcements
(6-8 weeks prior to the event):

Email Header:



SPREAD THE WORD!

MEET THE FIRMS VIRTUAL EXPERIENCE

Invite students to:

- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers

Subject: Help get students future-CPA ready at [Insert Chapter Name's] Meet the Firms Event

Copy: Spread the word! Students are invited to join us virtually [insert date] to learn more about their future career and gain an insider's view into the world of a CPA from those who know it best! As a part of the event, they will walk away with tools and personalized experiences to ensure they are future-CPA ready, while meeting with local CPAs and firms who might offer them a job one day!

Students can sign-up today to take part in this one-of-a-kind experience. Feel free to spread the word and send along this attached flyer [flyer can be accessed via the google drive] with more information.

MARKETING TEMPLATES

Member/Firm Participation Reminder (6-8 weeks prior):
Email Header:



Subject: Help Needed! [Insert Chapter Name's] Upcoming Meet the Firms Event

Copy: We need engaging CPAs and member firms like yours to take part in the upcoming [Insert Chapter Name's] Meet the Firms event. The purpose of the event is to give students an inside peek into the profession and area firms they may one day work for! Attendees will have the opportunity to meet and virtually mingle with local CPAs, hear more about career options and have their resume included in a booklet to be distributed to CPAs. This program is open to area college and university accounting student interested.

Please contact [insert chapter contact information] if you would like to be one of the amazing CPAs and/or firms to be a part of this event and meet the future of the profession. If you know of students or interns who could benefit from this experience, please encourage them to sign-up [insert registration link]!

Attached is a flyer with more information on the event for reference. We hope you can be a part of this one-of-a-kind experience.

Social Post:

Be a part of our upcoming Meet the Firms virtual event and meet the future of the profession. If interested, contact [insert chapter contact info].



Student Reminder (2 weeks post announcement):

Email Header:



MEET THE FIRMS VIRTUAL EXPERIENCE

- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers



Subject: Sign-up Today for [Insert Chapter Name's] Meet the Firm Event

Copy: Don't miss [Insert Chapter Name's] virtual Meet the Firm event [insert date] to learn more about your future career and gain an insider's view into the world of a CPA from those who know it best! As a part of the event, you will walk away with tools and personalized experiences to ensure you are future-CPA ready, while meeting with local CPAs and firms who might offer you a job one day!

Don't delay! Sign-up for this one-of-a-kind experience today!

Social Posts:

Don't miss [Insert Chapter Name's] virtual Meet the Firms event on [insert date] to get future-CPA ready. Sign-up today!



MARKETING TEMPLATES

Educator/University Contact & College Ambassador Reminder (2 weeks post announcement):

Email Header:



Subject: Spread the Word: [Insert Chapter Name's] Meet the Firms is [Insert the date]

Copy: Don't miss the opportunity to spread the word to students about [Insert Chapter Name's] virtual Meet the Firms [insert date] to learn more about their future career and gain an insider's view into the world of a CPA from those who know it best! As a part of the event, they will walk away with tools and personalized experiences to ensure they are future-CPA ready, while meeting with local CPAs and firms who might offer them a job one day!

Share the registration link below and pass along the attached flyer to anyone who may be interested in advancing their career with this one-of-a-kind experience.

MARKETING TEMPLATES

Optional Student Reminder (6 weeks post announcement - if you have an 8-week promotion window):

Email Header:

REGISTER TODAY! MEET THE FIRMS VIRTUAL EXPERIENCE

- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers



Subject: Still Time to Get Future-CPA Ready at [Insert Chapter Name's] Meet the Firms Event

Copy: Sign-up for [Insert Chapter Name's] virtual Meet the Firm event [insert date] to learn more about your future career and gain an insider's view into the world of a CPA from those who know it best! As a part of the event, you will walk away with tools and personalized experiences to ensure you are future-CPA ready, while meeting with local CPAs and firms who might offer you a job one day!

Don't delay! Sign-up for this one-of-a-kind experience today!

Social Post:
Still time to sign-up for [Insert Chapter Name's] virtual Meet the Firms event to get future-CPA ready.



MARKETING TEMPLATES

Final Call for Students (week prior to the event):

Email Header:



MEET THE FIRMS VIRTUAL EXPERIENCE

- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers



Subject: One Week Until [Insert Chapter Name's] Meet the Firms Event - Sign-up Today!

Copy: Last chance to experience [Insert Chapter Name's] Meet the Firms event to learn more about your future career and gain an insider's view into the world of a CPA from those who know it best! As a part of the event, you will walk away with tools and personalized experiences to ensure you are future-CPA ready, while meeting with local CPAs and firms who might offer you a job one day!

Don't miss this one-of-a-kind experience. Sign-up today!

Social Post:

Last chance to sign-up for [Insert Chapter Name's] virtual Meet the Firms event on [insert date]!



MARKETING TEMPLATES

Final Call for Educators/University Contacts & College Ambassadors (week prior to the event):

Email Header:

The graphic is split into two sections. On the left, a blue circle contains the text 'SPREAD THE WORD!' in white. To its right, the text 'MEET THE FIRMS VIRTUAL EXPERIENCE' is written in a dark red font. Below this, the text 'Invite students to:' is followed by a bulleted list: 'Get future-CPA ready', 'Meet local CPAs', 'Learn about career options', and 'Get in front of potential employers'. On the right side of the graphic is a photograph of a magnifying glass over a row of white paper cutouts of people, with one cutout highlighted in green and labeled 'FUTURE CPA' in red text above it.

SPREAD THE WORD!

MEET THE FIRMS VIRTUAL EXPERIENCE

Invite students to:

- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers

Subject: One Week Until [Insert Chapter Name's] Meet the Firms Event!

Copy: Last chance for students to sign-up and experience [Insert Chapter Name's] virtual Meet the Firm's event. As a reminder, attendees will:

- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers

Feel free to send along the attached flyer! We hope to see your university represented and appreciate your help with getting the word out about this awesome event.

 **IDEA:** Potentially spotlight the universities with attendees on a slide during the event, via social media and/or in a thank you email.

Students: What You Need to Know (2-5 days prior to the event):

Email Header:



MEET THE FIRMS VIRTUAL EXPERIENCE

Learn more about a career in accounting
and what it means to be a CPA!

Subject: It's Almost Time: Get Ready to Meet the Firms

Copy: You're in! Now let's make sure you make the most of the upcoming [Insert Chapter Name's] virtual Meet the Firms event [insert date]. To prepare, we put together a few reminders and tips below:

- Make sure you are camera-ready to help with engagement
- Dress for success - you may be networking with a future employer
- Upload the latest version of your resume for review in this google drive [insert link]
- Reference firm abstracts [insert link] prior to the event
- Have questions? Add them here [insert link to google form] so speakers can prepare in advance
- Ask your questions by going off mute (stay on mute otherwise to avoid background noise)

We look forward to seeing you virtually real soon. If you have further questions, feel free to reach out to XX [insert chapter contact's email].

Firms: What You Need to Know (2-5 days prior to the event):

Email Header:



MEET THE FIRMS VIRTUAL EXPERIENCE

Learn more about a career in accounting
and what it means to be a CPA!

Subject: It's Almost Time: Now Let's Get Ready to Meet the Firms

Copy: Thank you so much for your participation in the upcoming [Insert Chapter Name's] virtual Meet the Firms event [insert date]. To prepare, we put together a few reminders and tips below:

- Dress nice, but no need to suit up
- You are the key to their engagement so come with your winning personality
- Ensure you have submitted your firm's abstract, if applicable
- Reference questions they have submitted prior [insert link to google form] so you can prepare in advance
- Take a look at the resume book prior to the start of the event

We look forward to seeing you virtually real soon. If you have further questions, feel free to reach out to XX [insert chapter contact's email].

MARKETING TEMPLATES

Thank you to students for attending, reintroduce student member benefits and chapter events:

From: Chapter representative's email address

Image: Snapshot of zoom attendees but not necessary to have an image for this communication

Subject: Thank you for attending [Insert Chapter Name's] Meet the Firms Event!

Copy: We can't thank you enough for being a part of the Meet the Firms event. We hope the experience will fuel and prepare your journey to certification and career success. Please take a moment to complete this short evaluation [insert link to a google form] to help us improve the experience and program in the future.

We are excited to have you as a TXCPA student member and look forward to being your career advocate now and into the future. Be sure to make the most of your membership by taking advantage of:

- Future chapter student events [include any specific details for events here]
- Scholarships opportunities
- CPA Exam prep course discounts
- Free access to Thomson Reuters' Practice Ready Online Learning Program
- Connection with your peers and 28K Texas Society of CPA members via:
 - TXCPA Exchange, exclusive members-only online forum, for questions and knowledge sharing
 - Searchable online directory
- Dedicated communications and resources to keep you up-to-date on critical professional news
- Student Ambassador program to help spread the news of TXCPA membership on your campus

If you have further questions, feel free to reach out to XX [insert chapter contact's email] or Melinda Bentley at the Texas Society of CPAs.



IDEA: Use any testimonials you receive in the post-evaluation on social media and future year's event promotions.

Social Posts Suggestions:

Image: Post pic of zoom window with attendees

Copy: Our virtual Meet the Firms event was held XX [insert date of program] with [insert # of attendees, # of schools represented, # of firms participated] hopeful future CPAs ready to get CPA ready! We look forward to all they will be able to accomplish as the future of the accounting profession.

MARKETING TEMPLATES

Thank you to Educators/University contacts for helping!

From: Chapter representative's email address

Image: Snapshot of zoom attendees but not necessary to have an image for this communication

Subject: Thank you for helping make the [Insert Chapter Name's] Meet the Firms a success!

Copy: We can't thank you enough for encouraging your students to attend the Meet the Firms event. We hope the experience will further fuel and prepare them for their journey to certification and career success.

We are excited to have your students as TXCPA members. If some of your students were unable to attend and would like to become members, it's free! All they have to do is [sign-up here](#) and they gain access to benefits like these:

- Future chapter student events [include any specific details for events here]
- Scholarships opportunities
- CPA Exam prep course discounts
- Free access to Thomson Reuters' [Practice Ready Online Learning Program](#)

If you are not currently an educator member, we encourage you to look into becoming an Educator ambassador which comes with a special dues rate and free registration to the annual Accounting Education Conference. [Find out more here!](#)

If you have further questions, feel free to reach out to XX [insert chapter contact's email] or [Melinda Bentley](#) at the Texas Society of CPAs.

Again, thank you for all you did to help with this event and all you do for the future of the profession!

Flyer: Without date/Registration Information - could be added via email or through adobe.

Link to Flyer: XX



**SIGN-UP
TODAY!**

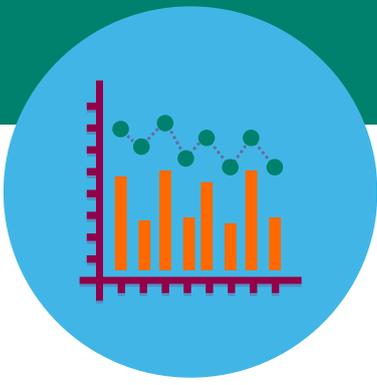
Learn more about a career in accounting and what it means to be a CPA!

Join us virtually to learn more about your future career and gain an insider's view into the world of a CPA from those who know it best! As a part of the event, you will walk away with tools and personalized experiences to ensure you are future-CPA ready. Attendees will experience:

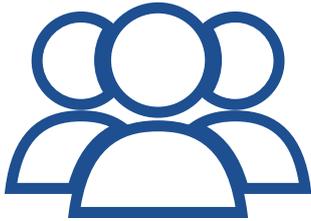
- Get future-CPA ready
- Meet local CPAs
- Learn about career options
- Get in front of potential employers

Sign-up today for this one-of-a-kind experience.

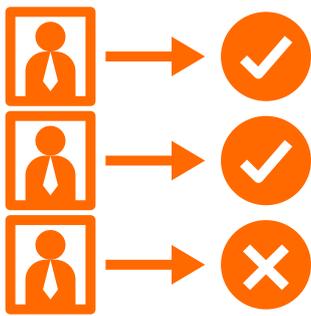
DON'T FORGET THE METRICS



To ensure success is measured for Meet the Firms and be able to report our reach think about the following:



- Number of student registrants
- Number of schools represented
- Number of new student members
- Incorporate an evaluation prior to the program on their understanding of the profession
- Send a follow-up after the program to gauge their awareness/interest after the program



YOU'RE PREPPED & READY!

We hope this playbook will lead to a successful program for all hopeful future CPAs and for your chapter. Please don't hesitate to reach out if you require additional assistance!

Melinda Bentley, CAE

Director, Marketing and Communications

Texas Society of CPAs

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mbentley@tx.cpa

