

CASE STUDY

MCCLINTOCK & ASSOCIATES

VIRTUAL NETWORKING CAMPAIGN

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SITUATION ANALYSIS

In 2020, McClintock & Associates, a public accounting firm specializing in compliance, audit and consultative services for post-secondary education institutions, was looking for help in extending the firm's thought capital during a time when in-person *everything* was put on hold.



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In its recent history, McClintock & Associates relied on speaking engagements, conferences and face-to-face meetings to promote the firm's services and expertise. As COVID-19 spread and meeting places across the world began to shut down, firm leadership had to decide how to shift its messaging to an online platform and provide clear direction during a very confusing time. With the U.S. government providing financial relief for small businesses, including various lending programs for McClintock & Associates' clients (largely, post-secondary education institutions), the firm tasked WordWrite to identify the best way to clear up complex messages from the Department of Education and describe rapidly evolving best practices.

GOAL

Share McClintock & Associates thought leadership with current clients and contacts through virtual presentations that clarify new programs and regulations concerning Federal Student Aid, Title IV compliance and related topics.

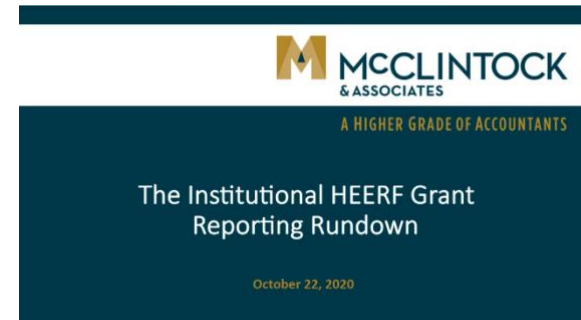
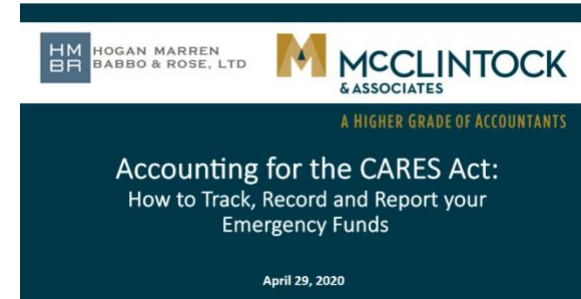
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STRATEGY & TACTICS

At the start of the pandemic, WordWrite met with the McClintock & Associates team to understand the dynamics between institutions and the Department of Education. Specifically, how will receiving a federally funded loan or grant provided during the pandemic affect post-secondary institutions when it comes time to file for forgiveness, undergo an audit or prepare their annual taxes?

We focused first on evaluating the best tools that would allow us to broadcast McClintock's position on recent announcements made by the Department of Education on loan application and forgiveness. While large group video conference calls were an option, we chose a more expensive webinar program to host the presentations, as it allowed for additional sharing, functionality and on-demand listening after the live event.



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EXECUTION

From April 2020 through October 2020, McClintock's staffers shared their perspective and expertise through a webinar series featuring four different presentations covering financial aid and new developments for post-secondary institutions during the pandemic. Not only did the webinars provide valuable information, but McClintock also made reporting templates and instructional downloads available on the webinar platform for attendees.

Individual webinar presentations included:

- ⇒ Accounting for the CARES Act: How to Track, Record and Report your Emergency Funds
- ⇒ Title IV Compliance Amid COVID-19
- ⇒ The Institutional HEERF Grant Reporting Rundown
- ⇒ Closing the Books on 2020: CARES Act Accounting and Projecting Composite Scores

The promotional plan for the webinar series was a straightforward email campaign amongst current contacts aware of McClintock's services and expertise. The tone of the email copy focused on helping their industry during a crisis. Both pre-and post-promotion included organic social media posts and a low-cost ad campaign driving additional registrations for on-demand listening. The marketing budget reflected McClintock's focus on informing their audience during a confusing time. Expensive lead generation campaigns were not our focus — being a helpful resource for McClintock's current clientele and industry contacts was the priority.

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RESULTS

The webinar series' goal was achieved and outperformed all of McClintock's expectations, as each session welcomed an average of 250 attendees and lasted well beyond the planned hour-long presentation, with an average webinar time of 75 minutes. The first session, which was meant to explain the breadth of COVID-19-related emergency programs and the associated requirements, had 368 attendees, while 103 questions were asked and managed live during the webinar.

The secondary outcome from the webinar series proved the value of sharing their expertise. McClintock saw a significant increase in the number of subscribers to the firm's blog, as well as increased outreach from prospects. The webinar series offered a vehicle to deliver much needed thought leadership and the firm continued to offer the expertise its clients and industry colleagues badly needed during uncertain times.

