



Diversity, Equity & Inclusion  
Training & Services



Strategic Marketing Guidance &  
Training for Firm Growth



## services: **diversity, equity & inclusion offerings**

According to survey after survey, the accounting profession is one of the least diverse among professional services providers. Yet many recognize the benefits of adding different voices to their teams and creating a culture that is more inclusive and comfortable for all. Therefore, I created my DEI consulting offering to help firms get the training and assistance they need to create a plan and achieve the results they want to stand out from competitors and thrive.



### **EVALUATION + PLANNING**

Getting started with a DEI initiative is often the hardest part. It frequently requires some uncomfortable conversations and careful introspection. I work with firms to evaluate where they are now and help them create a plan to get where they want to be. This often involves surveying and interviewing employees at all levels to get a clear picture of opportunities and challenges. In some cases, I deliver presentations on unconscious bias and the benefits of an inclusive culture to get buy-in and support from the leadership team, since without it, no program will succeed.



### **TRAINING**

A large part of achieving a more diverse, equitable and inclusive culture is simply informing your employees about why this is important, the benefits derived from a culture that embraces diversity and how to recognize and overcome unconscious bias. I provide a variety of training sessions that can be used firm-wide or with specific groups (i.e., firm administrators, marketing, partners, etc.), some of which qualify for CPE. Topics can be customized depending on where your firm is in its journey and the audience for the presentation.



### **PROGRAM DEVELOPMENT & EXECUTION**

At this stage, I can help your firm create a program that will help you reach your DEI goals. This includes everything from setting up a committee, to identifying short- and long-term objectives (and measurements) to defining roles for each member. If desired, I can help facilitate committee meetings and provide guidance and support as well.



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### DEI TRAINING

#### Learning Objectives:

- Define common terms and understand the benefits and importance of creating more diverse and inclusive culture at your firm.
- Evaluate and understanding your firm's current situation and develop a roadmap for improvements.
- Understand and overcome barriers to creating an inclusive culture, including unconscious bias, fear, lack of knowledge or personal experience, resistance to change and individual defensiveness.
- Tactical step-by-step recommendations for creating a more diverse and inclusive firm culture.

#### Audiences & Training for Each Group

*Sessions run 50 or 100 minutes*

##### Firm Administrators/HR Professionals/COO/Marketing/Team Leaders

- Understanding the importance of DEI in your firm, defining commonly used terminology and what it means for you and your workforce.
- Understanding and overcoming unconscious bias.
- Tips and recommendations for creating a more diverse and inclusive culture at your firm
- Creating a DEI program at your firm that is measurable and has true impact
- Successful strategies for engaging a multigenerational workforce and how to ensure all voices are heard for a stronger firm overall

##### Partners and Firm Leaders

- Understanding the importance of DEI in your firm, how to create a more inclusive culture, appealing to a more diverse group of clients and what is needed from a leadership level to ensure change occurs.

##### Firm-wide Training

- Understanding the importance of DEI in your firms, defining commonly used terminology and what it means for you and your workforce.
- What everyone can do to create a more inclusive firm culture, including learning commonly used terminology, having uncomfortable conversations and understanding the benefits of a diverse workforce and client base.
  - This could include a 2<sup>nd</sup> hour of role playing and Q&A.
- Successful strategies for engaging a multigenerational workforce and how to ensure all voices are heard for better problem solving and a stronger firm overall
- Listening session where everyone can submit questions in advance that we answer for the group without acknowledging the person who asked it



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### PROGRAM DEVELOPMENT SERVICES

- Surveys management and analysis to help firms:
  - Ascertain their current minority representation/demographic data including sex, race, LGBTQ, age, other factors
  - Get insight from all employees on issues the firm currently has and recommendations for improvement
- List of learning materials, including books, articles, podcasts, movies, sites/social media to follow
- Help creating a diversity statement and examples of what other firms have included in their statements (will also include information on how to use that statement and how to ensure it is being followed and enforced)
- Checklist on how to get started with a DEI program at your firm, how to establish priorities, developing SMART goals and what success will look like
- Consulting and assistance with creating a firm-level program that is tiered (initial consultation, regular training, attending and leading committee meetings, regular check-ins and helping to set additional goals, etc.)
- Train the trainer sessions for those leading the initiative in their firms
- Assignments that can be given to firm employees between trainings to further knowledge and reinforce training
- Tactics for creating a more inclusive culture, including recommendations for how to conduct meetings, allow for greater input from all levels and remove barriers that silent some voices



## Bonnie Buol Ruszczyk

**Bonnie Buol Ruszczyk** (like rustic without the “t”) is the founder and owner of bbr companies llc which provides strategic marketing planning and outsourced CMO- and director-level services for professional services firms. Most firms can benefit from the input of a seasoned, experienced strategic marketer, but don’t need or want to invest in that resource full-time. This way firm partners can focus on what they do best with the knowledge that their marketing (and often their marketing team) is being managed by an expert with their strategic plan always in mind.



Bonnie quite literally wrote the book on online marketing for accounting firms, [\*Take Your Marketing Online: Proven Ways to Grow Your Firm in the Digital Age\*](#), at the request of, and published by, the AICPA. She also contributed a chapter to [\*Bridging the Gap: Strengthening the Connection Between Current and Emerging Leaders in the CPA Profession\*](#) and is has been a contributor and quote source for a variety of industry-related publications and websites. She has been recognized as one of *Accounting Today’s Top 100 Most Influential People* (2012, 2013, 2016) and One to Watch (2011), [\*Volunteer of the Year\*](#) (2014) by the Association for Accounting Marketing and one of *CPA Practice Advisor’s Most Powerful Women in Accounting* (2015, 2016).

**On top of her marketing work with firms, she also helps them develop and implement diversity, equity and inclusion (DEI) programs. Having recently earned a [Diveristy & Inclusion Certificate from Cornell University](#), she is passionate about helping firms reach broader audiences, communicate more clearly and become leaders in the profession through training and program development.**

Before founding bbr marketing in 2009, she wore many hats, including serving as a public relations director for Sportbrain, a health and fitness startup in Silicon Valley, which allowed her to see the dotcom boom and bust firsthand; international marketing manager for Turner Broadcasting, where she helped launch TNT and Cartoon Network in Asia; and creative managerial roles with software and financial services firms, which started her on the path and laid the foundation for her passion and expertise for professional services marketing.

Bonnie hails from Lakeland, Florida but has firmly-planted roots in the Atlanta neighborhood of Kirkwood with her husband, Paul, and their two dogs. With original aspirations of being a journalist after graduating high school, Bonnie earned her BA in journalism, public relations and French from Troy (State) University in Alabama. She later followed up with an MBA with a marketing concentration from Georgia State University.

Never one to put aside her passion for marketing, small businesses and women’s issues when she closes the door at the end of the day, Bonnie also uses her acumen to help others simply because it matters. She is a founding member of the [Atlanta Independent Women’s Network \(AIWN\)](#), former board member of the Association for Accounting Marketing and a former president of its Atlanta chapter, current member and former marketing committee chair for CPA Consultants’ Alliance and former marketing committee chair and board member of Atlanta Chapter of National Association of Women Business Owners.