

The logo for clearlyrated, featuring a stylized green leaf icon above the word "clearlyrated" in a teal, lowercase sans-serif font with a registered trademark symbol.

# Digging Into the DEI Survey Results

ClearlyRated | AAM | bbr companies

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# About the Presenters



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CEO & Founder  
ClearlyRated



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Marketing Strategist  
bbr companies



# Study Background



- This 2022 DEI Survey of Accounting Marketers & Business Developers research project is a shared initiative between the Association for Accounting Marketing (AAM), a national trade association and a one-of-a-kind network of marketing, business development and growth strategists, and ClearlyRated, a leading accounting industry research firm. This project includes co-branding, promotion, and guidance from bbr companies, a strategic comprehensive marketing strategy and DEI consulting firm.
- This research aims to further position the partner organizations as accounting industry thought leaders and knowledgeable resources for accounting firms, specifically on the fundamental and ever-evolving topics of Diversity, Equity, and Inclusion (DEI). This research will provide the partner organizations actionable and impactful knowledge entirely unique to the accounting industry.



# Study Methodology

- Survey instrument designed jointly by ClearlyRated, bbr companies, and the Association for Accounting Marketing (AAM)
- Online survey hosted by ClearlyRated
- Survey fielding period from March 8<sup>th</sup> to March 25<sup>th</sup>, 2022
- **145** survey respondents, representing more than **100 accounting firms** participated in the study
- **Sample Note:**
  - As this study was designed primarily for marketing & business development respondents in mind, our sample is over-represented (83% of sample) by these functional areas. While many of this study's findings reflect perceptions and behaviors at the firm level and can be used to apply to the Accounting industry as a whole, it is important to keep in mind that our sample is not an accurate representation of the accounting industry in terms of job function.

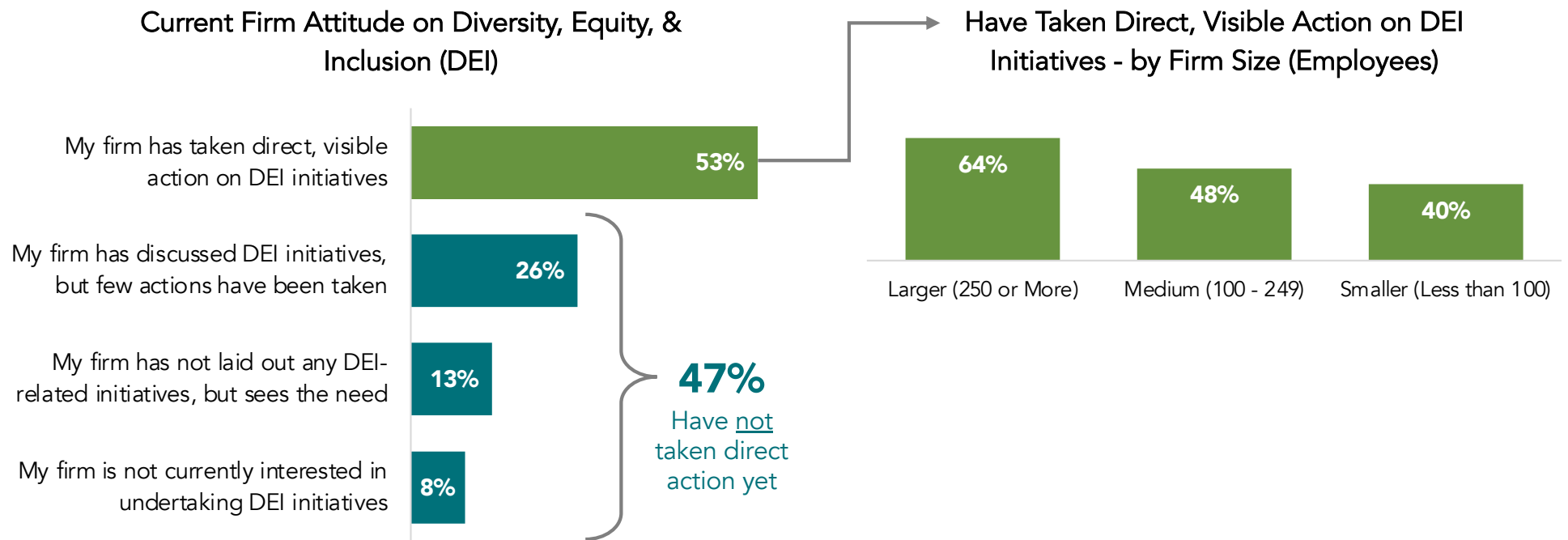




# The State of Diversity, Equity, & Inclusion among Accounting Firms

2022 DEI Survey of Accounting Growth Professionals

# Only half of accounting firms surveyed are acting on Diversity Equity, & Inclusion initiatives

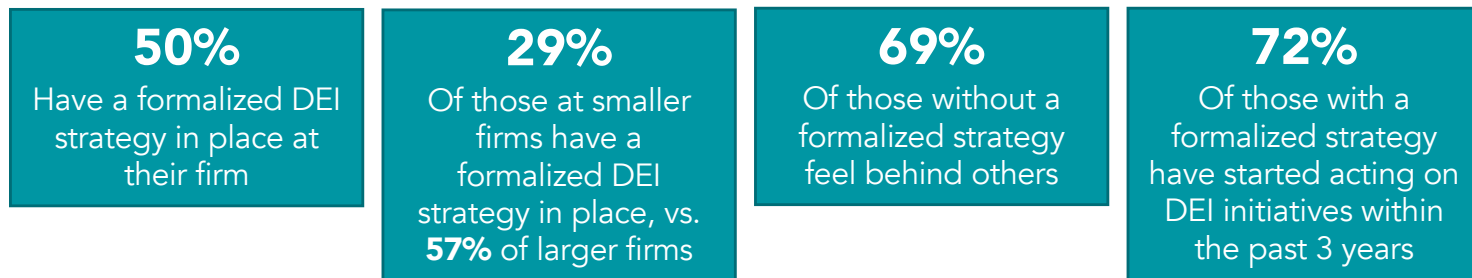


# Most firms feel on par with or behind others when it comes to DEI initiatives, and only half have a formal DEI strategy

My firm is \_\_\_\_\_ when it comes to implementing diversity, equity, and inclusion (DEI) initiatives.

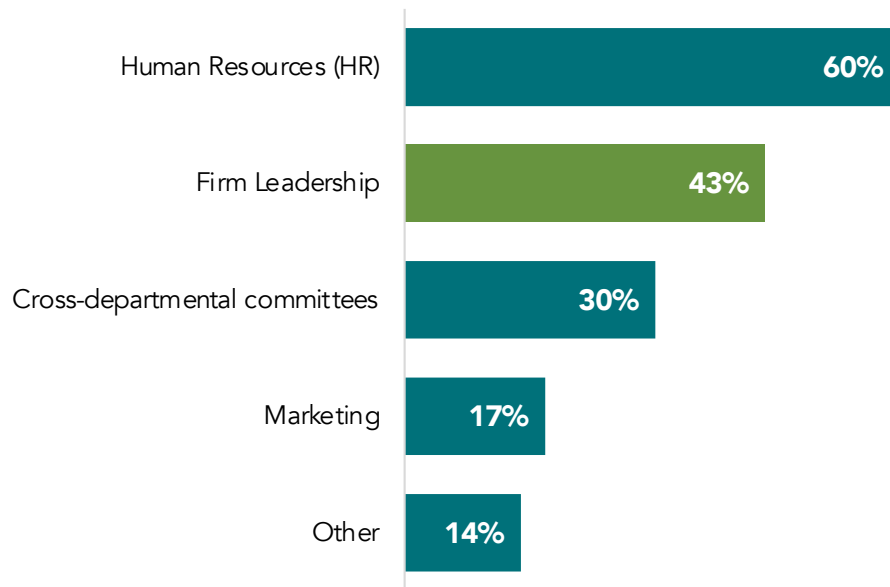


■ Ahead of others   ■ On par with others   ■ Behind others



# HR is the most common owner of DEI initiatives, but ownership from firm leadership impacts feelings of DEI progress

Primary Owner of DEI Initiatives

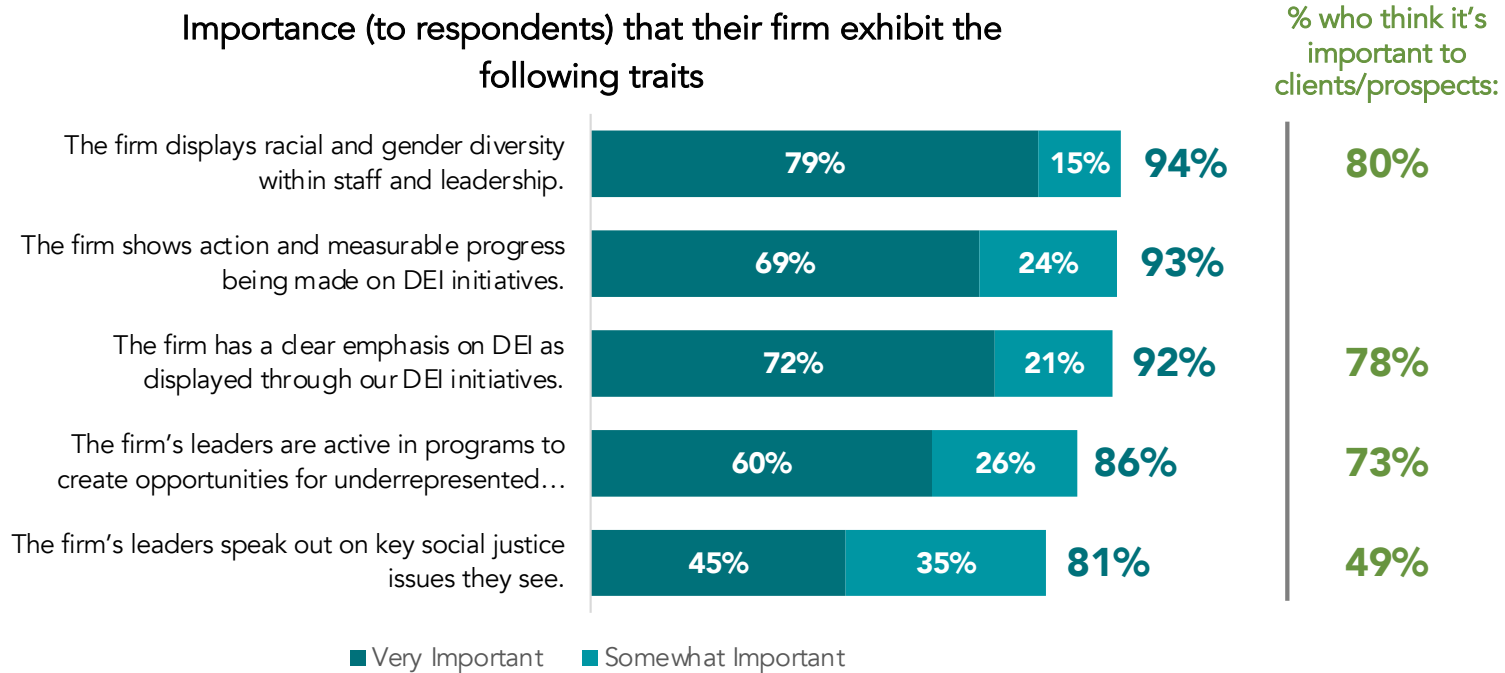


**74%**  
Of those that feel their firm is behind on DEI initiatives say that HR primarily owns those initiatives

**63%**  
Of those that feel their firm is ahead on DEI initiatives say that firm leadership primarily owns those initiatives

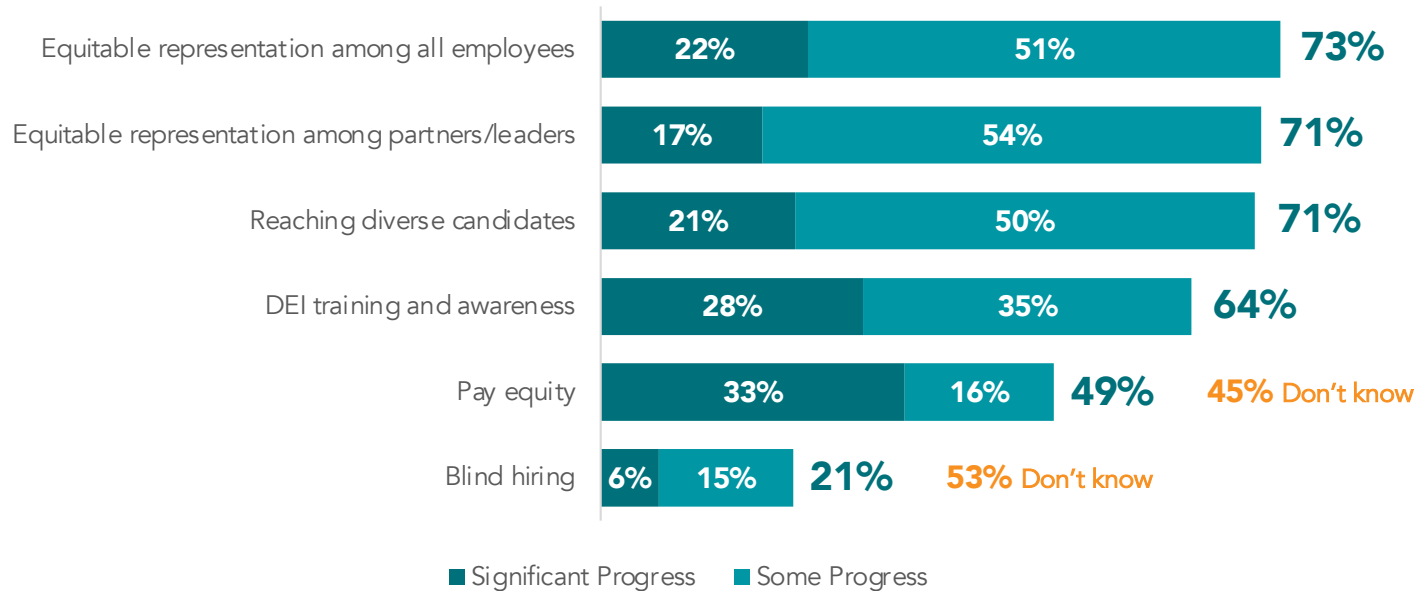


# Respondents nearly universally agree on the importance of diversity and progress on DEI initiatives, are less sold on value to clients



# Firms have made some progress in equitable representation among employees, and leaders; less progress in blind hiring and pay equity

Progress made at their firm for the following areas



A photograph of two women in a professional setting, overlaid with a teal gradient. The woman on the left has curly hair and is resting her chin on her hand, looking thoughtful. The woman on the right has straight hair and is looking down, possibly at a device. The word "Discussion" is centered in white text over the image.

# Discussion



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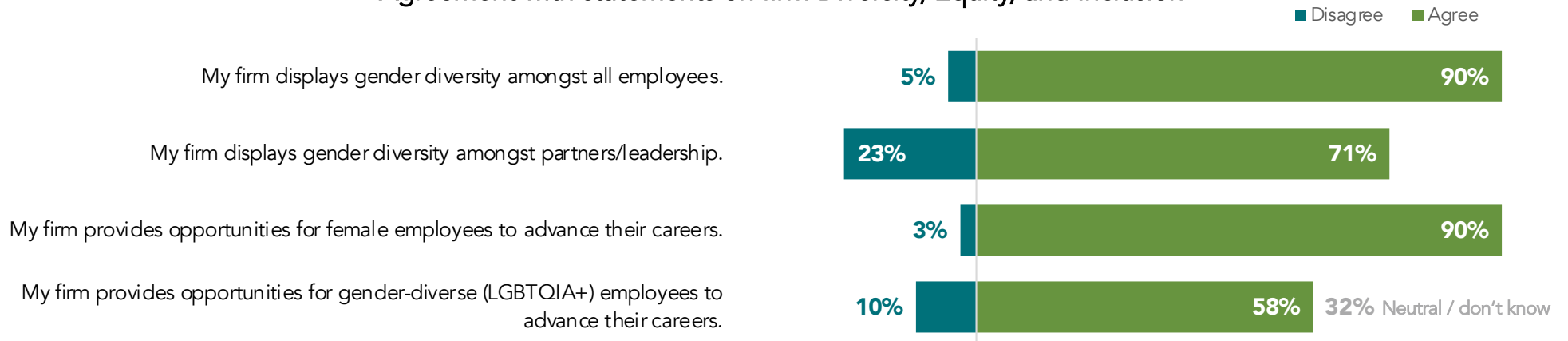


# Current Practices in Diversity, Equity, & Inclusion

2022 DEI Survey of Accounting Growth Professionals

# Respondents' firms tend to create a good environment for female employees to advance their careers, but not as much so for LGBTQIA+

## Agreement with statements on firm Diversity, Equity, and Inclusion



# Most respondents disagree that there is racial or ethnic diversity among leadership

## Agreement with statements on firm Diversity, Equity, and Inclusion

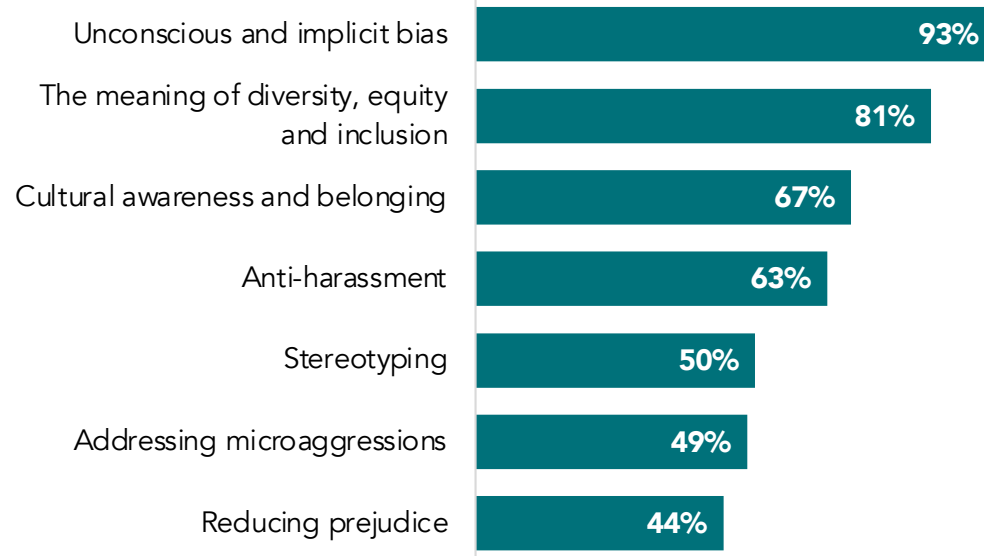


# Only half of firms are currently offering DEI trainings, and among those, most are training their employees semi-annually or less

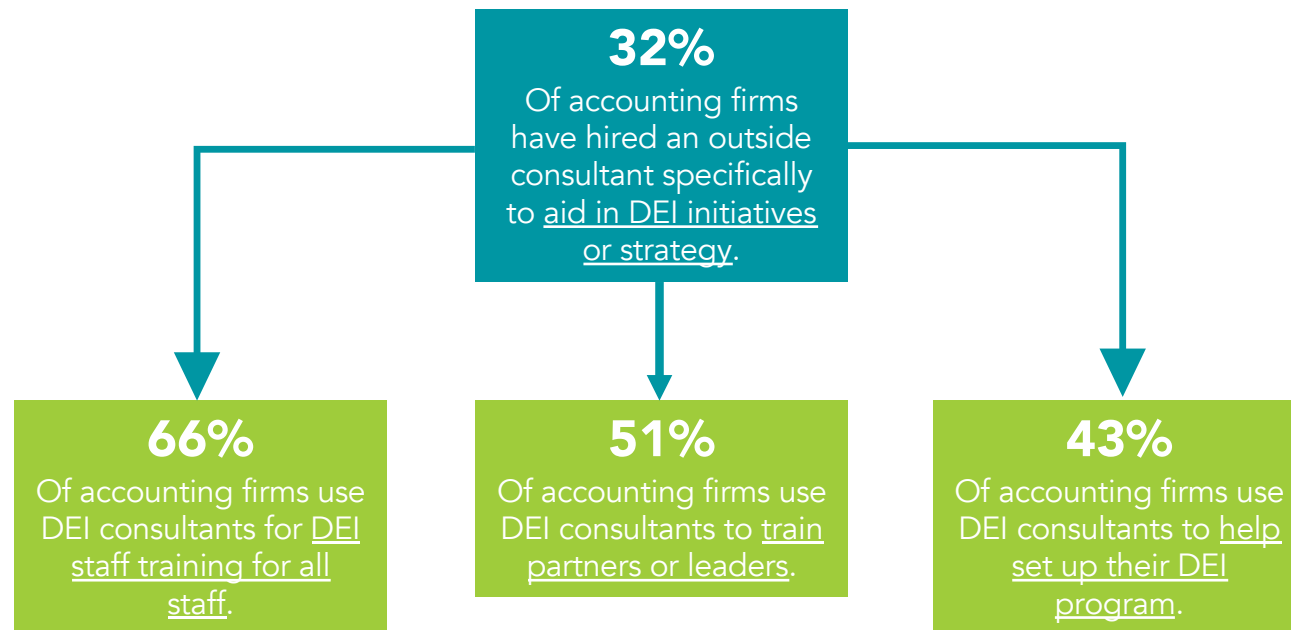
**52%**  
Of accounting firms are currently offering DEI-specific trainings to employees, and **45%** of those that do make it mandatory for employees

Frequency of DEI trainings (among those who offer training)	
Monthly or More	<b>20%</b>
Quarterly	<b>25%</b>
Semi-Annually	<b>17%</b>
Annually or Less	<b>38%</b>

## Specific DEI-related trainings offered (among those who offer training)



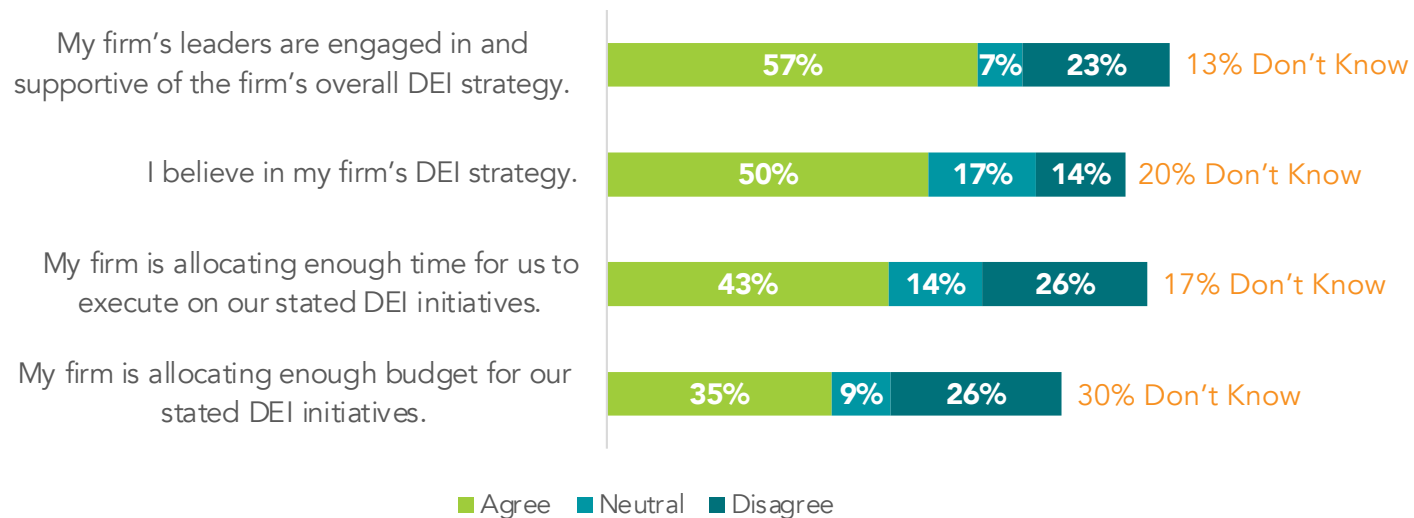
## Accounting firms that hire outside consultants to aid in DEI initiatives primarily have them train staff and set up their DEI programs





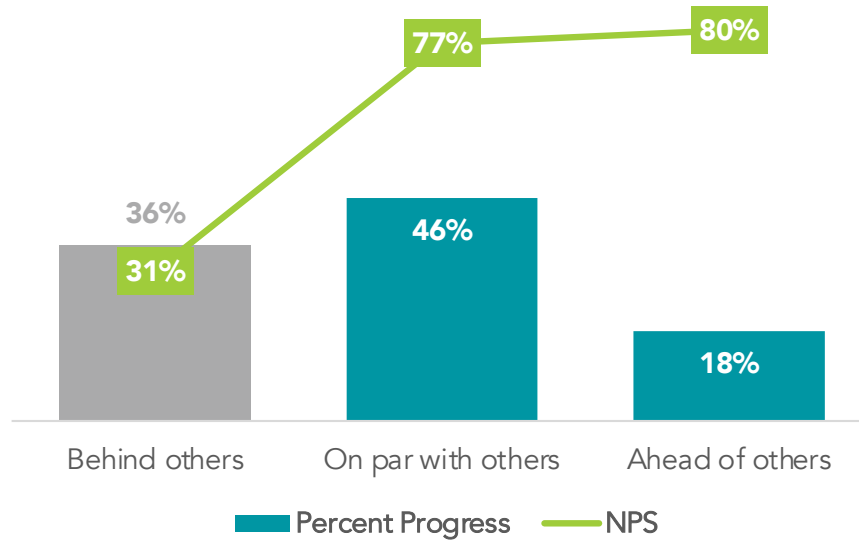
# Less than half of respondents believe their firms allocate enough time or budget for DEI initiatives.

## Agreement with Statements on firm Diversity, Equity, and Inclusion



# Keeping up in DEI initiative implementation and having a DEI strategy in place plays a key role in employee satisfaction.

NPS vs. Progress on DEI Initiatives



DEI Strategy in Place?	NPS
Yes	66%
No	54%



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# Diversity, Equity, & Inclusion in Marketing

2022 DEI Survey of Accounting Growth Professionals

All respondents that utilize DEI initiatives in their marketing efforts communicate their initiatives through company websites while less use traditional media.

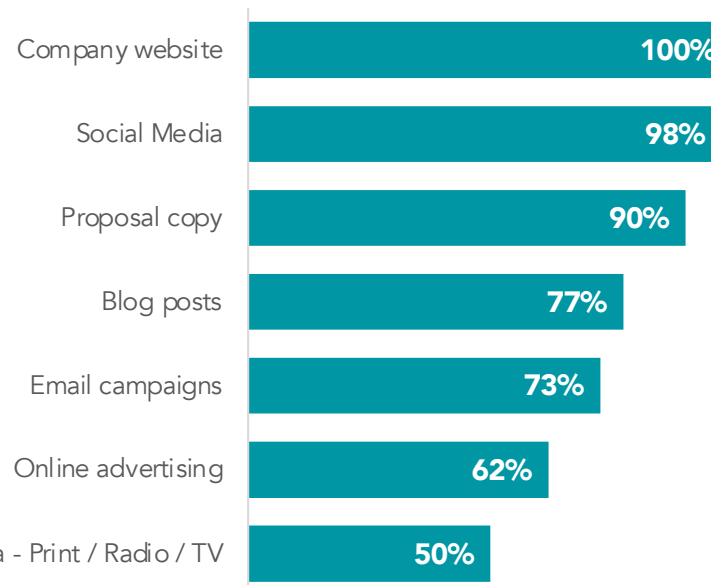
**61%**

Marketers or business development professionals utilize DEI initiatives in their marketing efforts.

**60%**

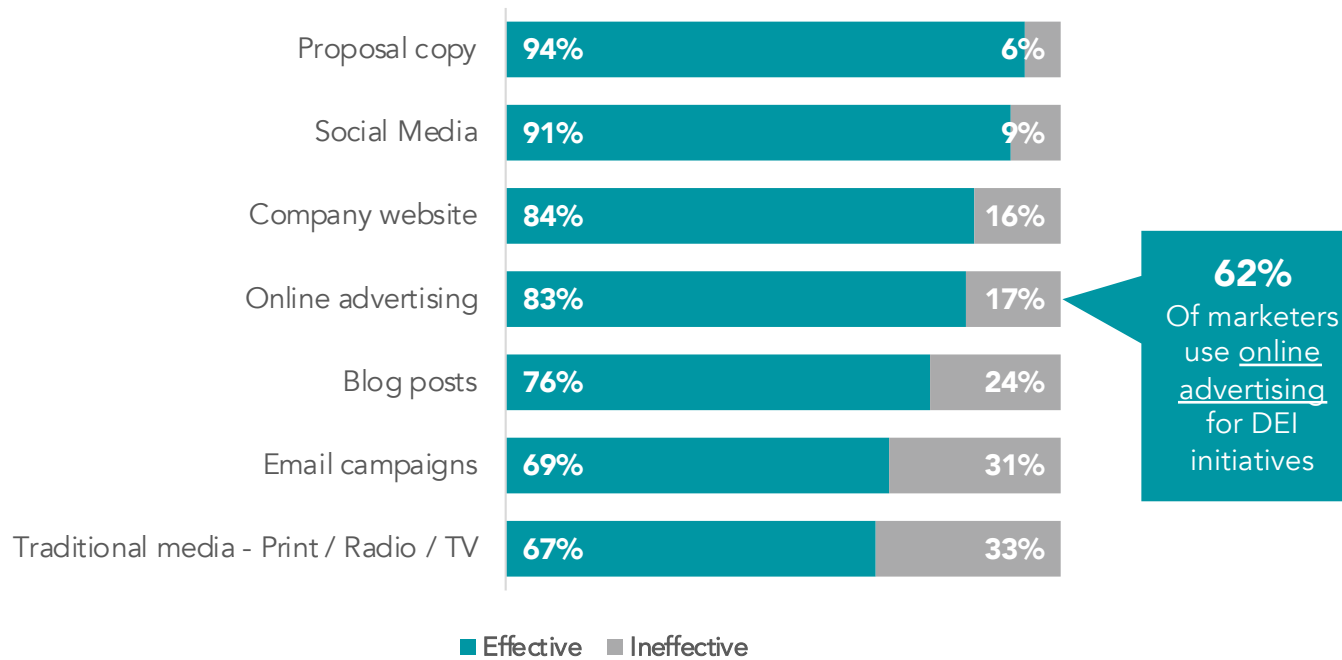
Of those who do not utilize DEI initiatives in their marketing efforts feel behind others in implementing DEI initiatives.

Mediums used in marketing DEI efforts



# Proposal copy is the most effective when it comes to marketing DEI efforts while traditional media is the most ineffective

Effectiveness of mediums in marketing DEI efforts



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