



2026 Summit Association for Accounting Marketing

Audio Recordings

The following sessions from the 2026 AAM Summit are available. Our keynotes, pre-conference workshop, and sessions not conducive to recording (Experience Exchanges) are not included.

- [Level Workshop - Business Development] Targeting & Landing Your Dream Clients
Speaker: John Atkinson
- [Level Workshop - Intermediate] Thrive then Soar: Build Your Career at a Firm You Love
Speakers: Jennifer Hertzog, Sean Smith, Julie Tucek
- [Level Workshop - Next Gen] The Business of Accounting: How Firms Operate, Grow, and Thrive
Speakers: Alex Drost, Laura Metz
- [Level Workshop - Senior/C-Suite] Elevating Marketing's Impact from Cost Center to Growth Engine
Speaker: Allison Schlegelmilch
- [Micro Learning Case Study] How to Build a Podcast That Turns Your Firm into a Content Machine
Speaker: David Leary
- [Micro Learning Case Study] Lessons From the Trenches: Blue & Co's path to HubSpot
Speakers: Sam Crist, Lissa Robinson
- [Micro Learning Case Study] One Survey, Year-Round Engagement: Practical Lessons from Meridian West and HLB
Speakers: Alastair Beddow, Lesley Hornung
- [Micro Learning Case Study] Strategically Creating Content that Connects
Speakers: Cassy Clayman, Jamie Miller
- [Micro Learning Case Study] The Evolving Importance of Relationships that Drive Growth
Speakers: Adam Klein, Alice Lerman, Lesley Cawley, Felicia Mullison
- [Micro Learning Case Study] You Already Have a Digital Asset Management Tool: Unlocking SharePoint's Hidden Power
Speaker: James Hirchak

- [Workshop] Account Planning: Breaking Silos and Building Strategy
Speakers: Kristen Petrel, Tiffany Orth, Lauren Price
- [Workshop] Beyond Bandwidth: Creative Tools and Tactics for Solo Marketers and Small Teams
Speakers: Joanne Thorud, Jaclyn Braga
- [Workshop] Unlock Your HubSpot Potential
Speaker: Anna Clyburn
- A Sorren Case Study in Navigating Rapid Change
Speakers: Tara Davis, Julia Sugden
- Agentic AI in Practice: Lessons Learned from James Moore Growth Experiment
Speaker: Stacy Dreher
- AI Execution: Do More with Agentic AI
Speaker: Apoorv Dwivedi
- AI Execution: Positioning Your Firm for AI-Driven Discovery
Speaker: Brian Swanson
- AI for BD: Building Your Sales Wingman in Copilot
Speaker: Sam Coursey
- AI Strategy: Content Strategy in the AI Era
Speaker: Nathan Kamradt
- Brand & Content Strategy: Are your Communications and PR Department Embracing the Future or Stuck in the Past?
Speaker: Jennifer Richardson
- Create Proposals that Spark Conversations, Connect with Clients, and Close (Bigger) Deals
Speaker: Jennifer Faulkner
- Data-Driven Made Easy: How to Build KPI Dashboards So Good They Eliminate Meetings
Speaker: Jack Tompkins
- Doing More with Less: Inside the Playbook of a 100+ Piece Content Case Study
Speaker: Bethany Silvis
- Driving Sponsorship ROI and Firmwide Buy-In
Speaker: Bob Silvy

- Empowering Future Firm Leaders Through Marketing & Business Development Training
Speaker: Amy Delaney
- How Video-Driven Strategy Becomes Your Firm's Content Engine
Speakers: Cassy Clayman, Sam Pagel
- Leading Through Disruption: What Marketing Doesn't See (But Your COO Does)
Speakers: Travis Bradshaw, Courtney Kiss
- Managing Scope: The Art of Saying "No"
Speaker: Jennifer Wilson
- Marketing and Sales Compensation and Benefits Trends
Speakers: Christine Nelson, Dawn Wagenaar
- Pick Your Player: A Marketer's Game-Based Guide to Content Format Mastery
Speaker: Charleigh Steelman
- Redefining Marketing's Seat at the Table: From Execution to Influence
Speaker: Jeremy Shen
- The Art and Science of a Great Sales Conversation
Speaker: Matthew Blank
- The Big Pitch
Speakers: Jennifer Wilson, Jeff Antaya, Tyler Roche, Kaitlynn Dailey, Marissa Anderson, Margo Andersen, Kristen Lewis, Raissa Evans, Staci Fors
- The Expert Engagement Playbook: How to Guide Your Firm's SMEs to Exceptional Visibility
Speaker: Austin McNair
- The Sales Doctrine: Building a Point of View That Aligns, Inspires, and Actually Works
Speaker: Angel Morgan
- Turning Client Survey Data into Actionable Results
Speakers: Ryen Salo, Julia Germeyer
- Unleash Your Firm's Growth Potential: Crafting a Winning Business Development Plan
Speaker: Neil Barrow