

# WOODARD™



**2021**  
PARTNERSHIP GUIDE

# WOODARD™

## Education

We deliver world class professional education through local training, national conferences, and virtual experiences. We train small business advisors to develop cutting-edge, highly innovative, and vibrant practices that transform small business. In addition to our extensive training on practice growth, practice development, and technology trends, Woodard partners with leading software developers like Intuit® to provide certification training and advanced product training on solutions highly relevant to small business.

## Coaching

Our coaching program – Woodard Institute – provides systems, processes, and tools to equip small business advisors to better manage their practices, extend value to their clients, develop specializations, grow their practices, and increase profitability. Woodard Institute also offers an interactive, peer-led community where advisors with shared practice goals and visions exchange ideas, provide guidance, and encourage each other along the journey to the next "versions" of their practices.

## Resources

We offer free, powerful resources designed specifically for small business advisors. Our online resources include a video case study called Tech Makeover and a podcast series based on our annual Scaling New Heights® Conference. Both productions add to the experience and value we provide in empowering small business advisors.

## Community

Our three community programs, Woodard Groups, the Mid-Market-Minded (M<sup>3</sup>) Coalition, and Woodard Alliance, provide interaction between professionals through localized small group meetings, online small group meetings, and a robust online community platform, respectively. The members of our professional communities share ideas, cross-refer specialized services, exchange information, and foster high impact, long-term relationships.



Main Stage: Scaling New Heights 2017

## About Woodard™

The Woodard organization is driven by a singular vision “to transform small businesses through small business advisors.” This vision encompasses businesses ranging from startups to those doing as much as \$50 million (or more) in annual sales, providing Woodard and its advisor community with a wide-reaching opportunity to radically impact businesses throughout the world.

As an extension of Woodard’s vision and mission, we partner with companies that offer solutions and services to small to medium-sized businesses (SMB) and to the advisors who support the SMB. These partnerships are key to Woodard’s ability to empower business advisors and to provide the SMB (through the advisor community) with much needed software solutions and support services.

## The Partnership Opportunity

By partnering with Woodard and its advisor community, you can extend and accelerate your reach throughout the SMB, increase close rates through pre-qualified lead generation, and subsequently, reduce cost of sales. If you couple this expanded reach with the channel strategy services provided by Woodard Consulting Group, you will create more sustained and predictable lead generation while reducing customer churn. An empowered, equipped channel will also reduce case load for your customer service and technical support teams.

We encourage you to explore the opportunities in this partnership guide and work intentionally with our team to design ideal strategies to meet your marketing, channel development, brand development, and product development goals.



### About Joe Woodard

As an author, consultant, business coach, and national speaker, Joe has trained over **125,000** accounting and business professionals in areas of practice development, changing technology trends, strategic consulting, and how to maximize the use of accounting software in their practices.

In **2012, 2014-2019** Joe was recognized by *Accounting Today* as one of the **Top 100 Influential People** within the accounting profession.

Joe regularly publishes articles for Intuit publications and for *Insightful Accountant*, and Joe has been featured repeatedly in *Accounting Today* and *AccountingWEB* in both articles and in video interviews. Joe is the CEO of Woodard Events, LLC which provides **education, coaching, resources, and a community** for small business advisors and small business owners within the accounting industry.



## Woodard Alliance Partnerships

Woodard Alliance is an independent community of small business advisors offering its members a powerful slate of tools, systems, and shared knowledge.

### About Our Members

Woodard Alliance members are among the most intentional and technically advanced small business advisors in the world. Firm sizes range from small practitioners (about 55% of our membership) to regional accounting firms. Members support clients who range from startups to mid-market.

### Member Benefits

Members receive the following benefits:

- A monthly members' only webinar
- An online community including a highly interactive forum
- An on-demand video learning library
- Discounts on Scaling New Heights
- Special offers from our Alliance developer partners

### The Partnership Opportunity for Developers

We partner with software developers to seed product awareness and foster practice-wide adoption of their solutions.

To partner with Woodard Alliance, participating developers provide our members with a unique software benefit not available outside of the Alliance and commit to sponsoring each year of the annual Scaling New Heights conference.

In return, we promote your product to our Alliance members, create awareness for your product to the larger accountant and bookkeeping communities as part of our marketing around the Alliance, and encourage members to deploy your solution throughout their practices.

### Interested in Partnering with Woodard Alliance?

Contact us today at [info@woodard.com](mailto:info@woodard.com)!



*Our partnership with Woodard Alliance is making a big difference in our launch of Liscio. I highly recommend working with this top tier community of business advisors!*

-Chris Farrell  
CEO, Liscio



## ALLIANCE PARTNERS





## Woodard Group Partnerships

Woodard Groups are local, face-to-face networking communities for small business advisors. Woodard Groups foster deep, long-term networking relationships that focus on the members' shared passion around the success of their small business clients. By interacting throughout the year – and at a local level – the professional relationships our members build through our local groups are unique, enduring and high impact.

### The Opportunity for Developers

Most group meetings offer an in-depth training segment. Topics often include technical training on small to medium-sized business technologies, with an emphasis on products that integrate with accounting solutions. Woodard Group meetings are a great place to demo products, deliver topical presentations, and/or host a social.

Sponsorship Opportunity	Price
Personal Introduction by Joe Woodard to Group Leaders	Call for Pricing
National Sponsorship of All 50+ Woodard Groups	Call for Pricing
Accountant & Bookkeeper Symposiums	Call for Pricing

### Accountant & Bookkeeper Symposiums

These localized small group discovery sessions provide an intimate atmosphere where you can feature your solution or service and network with influential accountants and bookkeepers. These "super" Woodard Group meetings are a great way to feed (or seed) channel programs, glean feedback from highly experienced small business advisors, and generate referrals.

**For information on how you can partner with Woodard Groups or host your own Symposium Event contact us at [info@woodard.com](mailto:info@woodard.com).**

## Groups throughout the U.S.

- Akron, OH
- Austin, TX
- Baltimore, MD
- Boise, ID
- Dallas, TX
- Denver, CO
- Las Vegas, NV
- Louisville, KY
- Miami, FL
- Northeast Atlanta, GA
- West Atlanta, GA
- Oklahoma City, OK
- Portland, OR
- Boston, MA
- Rochester, NY
- Salt Lake City, UT
- San Francisco, CA
- San Diego, CA
- Santa Barbara, CA
- Houston, TX
- Northern NJ
- NW Arkansas
- Grand Rapids, MI
- Chicago, IL

*... and more!*



## Woodard Institute Dinner Sponsorship

**The Event:** The Woodard Institute Dinner is an annual event, co-located with the annual Scaling New Heights conference, and is exclusive to Institute participants. Institute participants are practice leaders who have made a significant investment in the advancement of their firms, the adoption of technologies, and the development of advisory skills. Our coaching program includes a highly collaborative platform in which advisors frequently interact with one another about the technologies and strategies they use in their practices, which creates a powerful opportunity for peer to peer recommendations of your product or service.

**The Sponsorship** (\$20,000 - 1 available): Your exclusive sponsorship of the Woodard Institute Dinner gives you a unique opportunity to network and build relationships with this elite group of business advisors who strongly influence the buying decisions of their clients. As the sponsor of the Woodard Institute Dinner you will also receive:

- An introduction by Joe Woodard during the dinner
- Placement of branded signage at the dinner venue\*
- A suite at the hotel at standard guest room rates where you can conduct meetings both with attendees you meet at the Institute Dinner and with VIP prospects you meet throughout the conference

\*Branded items provided by the sponsor and subject to approval by Woodard.

\*\*We will invite selected participants to meet with you in your suite throughout the week.

## Woodard Summit Sponsorship

**The Event:** Woodard Summit is an immersive, interactive, weekend event beginning on the Friday evening leading up to each year's Scaling New Heights conference, where a select group comprised of the most committed advisors within the Woodard community hone and expand their advisory skills.

**The Sponsorship** (\$5,000 - 10 available): As a Woodard Summit sponsor, you will experience the event alongside the attendees, participating in the interactive learning experiences and exercises, and building relationships with some of the world's most intentional and proactive small business advisors. Your sponsorship also includes:

- A tabletop where attendees can meet with you to discuss the value proposition of your product or service
- Placement of branded signage\*
- Recognition as a sponsor on the Woodard Summit website

\*Branded items provided by the sponsor and subject to approval by Woodard.



## Educational Sponsorships

Woodard Events delivers world-class professional education through local training, national conferences, and virtual experiences. We train small business advisors to develop cutting-edge, highly innovative, and vibrant practices that transform small business. In addition to our extensive training on practice growth, practice development, and technology trends, Woodard partners with leading software developers to provide certification training and advanced product training on solutions highly relevant to small and medium sized businesses.

## Webinars

You will have the opportunity to share your value proposition with 100's of the world's leading QuickBooks ProAdvisors. Webinars focus on both technology and practice management topics and are designed to educate and equip small business advisors while driving highly qualified, opt-in leads. Investment: \$5,000 per Webinar.

- **Direct the content**, working with Joe Woodard, to focus on your product's value proposition
- **Provide a subject matter expert** to present or to be interviewed by Joe Woodard (Optional)
- **Gather hundreds of opt-in leads.** During the webinar, Joe will personally speak about the value of your product and provide an option for attendees to request a contact from you about your product or service

## The Woodard Report

The Woodard Report is the media arm of Woodard and offers technical articles on: QuickBooks and other small business solutions; income tax compliance; sales tax compliance; payroll tax compliance; practice management; client advisory; small business operations...and more. The Woodard Report has over 25,000 subscribers and during 2021 will have an estimated 60,000 unique readers within the accounting and bookkeeping professions.

We offer two types of promotional opportunities around The Woodard Report.

- **Contributed Content, i.e. Advertorial (\$1,000 per article)** Submit an article, subject to editorial oversight, that highlights the value proposition of your product or service. Tip: Couple the article with a webinar, where the article summarizes the webinar content to reinforce the message and to drive additional viewers.
- **Columnist (\$25,000 per column. Limit one column per sponsoring company)** The columnist option has a 12-month term.
  - Submit articles, subject to editorial oversight, that accentuate the value proposition of your product or service. You can submit as many articles as you like with a minimum commitment of 24 articles per year at the publication frequency of no fewer than two articles per month
  - Curate content contributed by others. As part of this curation you may:
    - Prohibit content provided by your competitors or content that features your competitors
    - Add footers to content provided by others. These footers can reference your solution, other articles in your column that feature your product, resources available through your website, etc.
    - Work with contributors to accentuate the value of your product or service, subject to contributor and editorial approval



## Scaling New Heights® Conference Sponsorships

The Scaling New Heights Conference is a unique, technology-centric training experience that also includes practical, cutting-edge professional education. Scaling New Heights fosters networking relationships among the most successful accountants, bookkeepers, and consultants in the country and provides resources that empower these professionals to grow their practices and provide higher levels of value to their clients.

### Key Demographics

#### Attendee Firm Size

Scaling New Heights attendees come from a variety of firm sizes with 25% of the firms having over 10 professionals. On the top end of the demographic, ten of the largest 100 CPA firms in the country regularly attend the conference. In fact, 20% of the top 300 firms in the country attend Scaling New Heights.

#### Attendee Client Size

Our attendees support small to medium-sized businesses ranging from start-ups to those generating up to \$50 million in annual sales. Given the strong participation of the QuickBooks Solution Provider channel, our attendees often support numerous clients in the emerging business market.

**45%**

of attendees at Scaling New Heights are from multi-practioner firms.

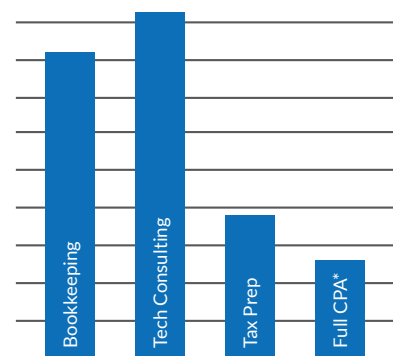
**50%**

of Advisors at Scaling New Heights are first-time attendees.

**99%**

of attendees at Scaling New Heights are QuickBooks ProAdvisors.

Attendees by Service Type



\*Full Service CPA firm

Note: Most attendees are represented in multiple categories above.





## Exhibit Opportunities

### Exhibition Packages

Our exhibit floor represents one of the largest accounting technology expositions in the world, featuring over 100 software solutions, numerous networking attractions, and both Woodard's and Intuit's corporate booths.

The attendees of Scaling New Heights are highly advanced and motivated small business advisors who explore our exhibit hall with great intentionality and with specific practice and client needs in mind.

All exhibit packages for Scaling New Heights include the following:

- Booth/Table Top Placement
- External TV/Monitor
- Staff Badge(s)
- Wi-Fi Internet Access
- Power Drop
- Discounts on Additional Staff Badge(s) - Does Not Include Innovation Alley
- Badge Scanning Application
- Listing: Conference Site and App

### Exhibit Enhancements

Draw more attention to your brand and traffic to your booth through high visibility exhibit enhancements. Use your enhancement to increase lead generation, draw attention to special promotions or booth events, and interact with more attendees throughout the conference. Use enhancements to increase lead generation. Examples of enhancements include:

- Gourmet Coffee Station
- Selfie Station
- Charging Station
- Branded Napkins during Lunch
- Floor Clings
- Upgraded Afternoon Snack Break





## Speaking Opportunities

### Main Stage Presence

Our Main Stage sessions draw about 80% of our conference attendees and reach an additional audience of thousands of accountants and bookkeepers who watch the live stream of the main stage online.

During one of the Main Stage sessions, a representative from your company will present an inspirational or educational topic in a 10-minute “TED-style” talk. Although you won't be able to sell your product during the talk, your highly engaging and entertaining presentation can optionally include an invitation to join you at your booth for follow-up questions or comments. You can also conclude your talk by offering attendees a special gift or resource available at your booth.

### Host a Main Stage Session - Price - \$15,000

As a Host of the Main Stage, you will receive the following benefits:

- A 10-minute Main Stage presentation
- Recognition as a Main Stage presenter on the conference website and in the conference app
- During walk-in and exit, verbiage on the screen that reads “This Main Stage session is brought to you by [your company logo]”
- Recording of your session
- Embed code to allow you to embed your Main Stage presentation on your website
- Chair drop provided by you placed on each attendee's seat

### 10 - Minute Main Stage Talk - Price - \$10,000

- A 10-minute Main Stage presentation
- Recognition as a Main Stage presenter on the conference website and in the conference app

### Breakout Speaking Opportunities

Breakout sessions at Scaling New Heights are heavily attended and highly rated, giving the conference our hard-fought reputation as one of the most advanced and high impact learning environments for accountants and bookkeepers in the world. Host your own breakout session at Scaling New Heights through one or both of the following options:

- **Power Breakfasts.** We host these events 7:00-7:50 AM on Monday through Wednesday of the conference. Power Breakfast presenters have the option of demonstrating and promoting their products or services during the training sessions. Power Breakfast pricing based on sponsorship level. See pages 14-15 of the Partnership Guide.
- **Breakout Sessions.** During our main tracks, your educational topic will reinforce your subject matter expertise and the value proposition addressed by your product. You can optionally use your breakout to prepare advisors to certify on your product. Pricing: One 50-minute session \$7,000. Two 50-minute sessions \$6,000 each. Three sessions - \$5,000 each.



## Sponsorship Expansions

### Interview with Joe Woodard

Joe Woodard will personally interview one representative from your company, asking questions related to your field of expertise and the specific area of the market addressed by your products or services. This interview is an opportunity to create a powerful marketing asset, to reinforce your company's representative as a thought leader within the industry, and to extend your message beyond the borders of the conference. Price - \$3,000.

We will:

- Record your video during the conference and provide you with the footage for use in your own marketing efforts
- Convert the interview to an article on The Woodard Report with a link for readers to watch your interview on-demand
- Feature your Woodard Report article in our newsletter to over 25,000 accountants and bookkeepers
- Promote the written and video interview through Woodard's social channels of over 10,000 accountants and bookkeepers

### Convention Center Signage

The convention center provides numerous, highly visible branding options like banners, digital displays, escalator clings, wall clings and column wraps. Place your branding in prominent locations throughout the convention center. Call for pricing.

### Conference Wide Chair Drops

Provide a branded item on each seat or table placement for attendees to read when they sit for breakfast, lunch or breakout sessions. Include a call to action that drives attendees to your booth like raffle tickets with specific times during the conference when you will select winners. Get creative in how you use your seat drop to drive booth traffic and generate leads! Breakfast - \$3,000. Lunch - \$4,000. Breakout - \$5,000.

### Lanyards

This sponsorship offers one of the highest profiles in the show and allows you to provide branded lanyards for all conference participants, including attendees, sponsors, VIP guests, and Intuit representatives. Woodard Events will design and produce the lanyards as part of your sponsorship investment. Price - \$20,000.





## Social Sponsorships

### Conference Wide Event

We will promote your exclusive, conference wide event to everyone attending Scaling New Heights. We will assist you with venue selection and budgeting around food and beverage (food is optional) and will consult with you, upon request, around the theme of your event. Additionally, we will promote your event through the conference website, through email drops to conference attendees, through the conference app, and through announcements from the main stage during the conference. This highly visible and high impact event is a great way to drive booth traffic (e.g. to pick up event passes or drink tickets), to differentiate yourself during the show, and to generate leads. Price - \$15k plus expenses.

### Special Event Sponsorships

During the conference, we host numerous events for specific attendee segments like Woodard Alliance members, first time attendees, Woodard Institute members, and Woodard Group Leaders. Sponsors of these special events receive branding on the conference website and other conference materials, an opportunity to address attendees, and an encouragement from one of our team members - usually Joe Woodard - to visit your booth during the conference. Price - \$10k plus expenses.

### Private Social

We will facilitate, promote, and coordinate your VIP event and will hand recruit attendees based on your ideal target demographic. Private socials range from 10 to 20 attendees, and Joe Woodard can optionally host your social in his private suite at the headquarters conference hotel. Example audiences for your social include mid-market advisors, multi-practitioner bookkeepers, regional accounting firms, custom report designers, or any other specific demographic that participates in Scaling New Heights. Price - \$5k plus expenses.





## Digital Sponsorships

### Streaming Video Sponsorships

During the week of the conference, we provide a stream of conference-related content. The channel runs live during all main stage sessions of the conference and selected presentations are also available on demand throughout the year. This highly promoted streamed experience is heavily attended with a viewer base similar in size to our onsite audience. Please call for pricing.

#### Title Sponsor

- Mentions and "thank you" references during streaming events that take place prior to or after the live session
- Option to run up to 10 video advertisements per day on our streaming channel between live events
- "Brought to you by" branding
- Recorded interview with Joe Woodard
- Optional registration promo ad with lead capture
- Most prominent banner ad on the Streaming Page (See "Banner Ad" below for more information)

Note: All items subject to Woodard Events approval.

#### Banner Ad

Your sponsorship includes branding and advertising placements on the streaming page of the conference site. Through your advertising placement, you can optionally make a lead-generating offer to the streaming audience (with a response form). Please call for pricing.

### Conference App

Our custom-designed conference app is central to each attendee's experience throughout the show. Attendees manage contests, training schedules, session handouts, session evaluations, social media, and peer-to-peer networking through the app. As a result, attendees log into the app, on the average, over 20 times per day during the conference.

#### Option 1: Primary Sponsorship

Your sponsorship includes a stationary logo on the app main screen, one banner ad, and three text alerts to all conference attendees. Examples of what you might promote using a text alert include your Power Breakfast or breakout session(s) or a drawing or other special event at your booth. Price - \$10,000.

#### Option 2: Banner Ad

A banner ad displayed in the app, including a hyperlink to a website or PDF document. Price - \$1,000 each.

#### Option 3: Push Notifications

Instant message alerts during the conference. Price - \$250 each.



# Scaling New Heights Sponsorships

Note: Retail value at a la carte pricing in brackets (\$\$) below package price.

	<b>Elite Partner \$100k (\$137,750+)</b>	<b>Partner \$50k (\$65,250+)</b>
Booth Size	20x20	20x20 or 10x20
Placement	Island	Island 20x20 or Double Corner
Number of Passes*	20	15
Listing on conference website	•	•
Lead capture/badge scanning solution	•	•
Additional badges for company employees at discounted rate of \$400*	20	10
1 HD TV or Computer Monitor	55"	42"
Option to Host Private Social**	Included	\$2,000
Power Breakfast Session	•	•
Industry Press Interview	•	•
Social Media Amplification	3 Posts/Likes	2 Posts/Likes
Text Alerts on Conference App	2	1
Chair Drops	1 Breakout	1 Lunch
Conference Wide and Live Streamed Main Stage Presentation***	Main Stage Host Plus 10-Minute Keynote	Main Stage Host Plus 10-Minute Keynote
Podcast Sponsorship	Mention in 3 episodes with Branding on Podcast Page	Mention in 1 episode with Branding on Podcast Page
Lanyards, Conference Entry Branding, Column Wraps, Exhibit Hall Arch, Conference App, Welcome Social	Pick 1 (Pick before Non-Elite Partners)	Pick 1 (Pick after Elite Partners)
Product Training or Certification Sessions	One 50-Minute Session & Two 100-Minute Sessions	One 100-Minute Session
Pre-Conference Email Inclusion for Email to Conference Registrants	•	•
Dedicated Pre-Conference Email to Conference Registrants	•	
Interview with Joe Woodard	•	
Pre-Conference or Post-Conference Webinar (Marketed to 25k Advisors)	•	
Live Stream Sponsor	•	

## A la Carte Options

Note: A la carte options are available to sponsors at the Silver sponsorship level and above.

Power Breakfast Session	\$5k
Feature Station (ex: selfie station, coffee bar)	\$5k (plus expenses)
Chair Drops	\$3k Breakfast, \$4k Lunch, \$5k Breakout
Training or Certification Session(s) (1,2, or 3)	\$7k, \$12k, \$15k
Conference App Sponsor	\$10k
Conference App - Banner Ad	\$1k
Conference App - Text Push	\$250 /push

\*Sponsor badges are available only to full time employees of your organization who are attending the show to represent your company/product during the conference. Passes granted in conjunction with your sponsorship or at the discounted sponsor rate require a guest room reservation at one of the hotels in our room block.

<b>Premium \$35k (\$39,500+)</b>	<b>Diamond \$20k (\$22,250+)</b>	<b>Gold \$10k</b>	<b>Silver Plus \$7k</b>	<b>Silver \$5k</b>	<b>Innovation Alley \$2.5k</b>
10x20	10x20	10x10	10x10	10x10	Tabletop
Prominent	Preferred	Preferred	Standard Corner	Standard Inline	Innovation Alley
10	8	4	2	2	1
•	•	•	•	•	•
•	•	•	•	•	•
5	4	3	2	1	0
42"	42"	42"	22"	22"	22"
\$2,500	\$3,000	\$3,500	\$5,000	\$5,000	Not Available
•	•	\$3,000	\$4,000	\$5,000	Not Available
•	•				
1 Post/Like	1 Post/Like				
1	1				
1 Breakfast					
10-Minute Keynote					

Host - Special Event (e.g. New Attendees, Woodard Alliance, etc.)	\$10k (plus expenses)
Private Social (20 person cap)	\$5k (plus expenses)
Conference Wide, Promoted Social	\$15k (plus expenses)
Main Stage - Host and Presentation	\$15k
Main Stage Presentation	\$10k
Conference Branding - Entry or Column Wrap	\$20k each (Call for details on additional signage options.)
Floor Clings	\$750 each
Lanyards	\$20k

\*\*Your investment includes hosting, recruitment, venue, and administrative support. Does not include food and beverage. Limit 20 people.

\*\*\* Main Stage Host package includes branding, 10-minute presentation, chair drop, and main stage mention from conference host where the host will encourage attendees to visit your booth and will encourage streaming viewers toward an online call to action.

The image features a dark blue background with a lighter blue curved band at the top and bottom. In the center, there are silhouettes of several people in a meeting or office setting. The word "WOODARD" is written in large, bold, white capital letters across the middle of the silhouettes. A small "TM" trademark symbol is located to the upper right of the letter "D".

**WOODARD**<sup>TM</sup>