

MarCom Awards 2021

Category: 264. E-Newsletter (Internal)

Situation and action statement

Over the past decade, Wipfli has experienced dramatic growth and has evolved from a mid-sized accounting firm to a top-20 firm that derives 40% of its business from consultative services in a variety of industries and practices.

In 2020, the firm launched a new brand identity, transitioned to Microsoft Teams and hired a new internal communications team to modernize the communications plan and strategy. The team redesigned the Intranet (see our submission in that category) and aligned the weekly newsletter – the Wipfli Weekly – with the new branding and Intranet strategy.

The remaining pages show the following:

1. The newsletter before any changes were made
2. The first redesign to bring in brand standards and add some strategic thinking to the publication
3. The final product designed to deepen our brand alignment and to drive employees to the new Intranet.
4. A screenshot of the new Intranet to show the alignment between the two employee communications.

The newsletter is delivered in Outlook today but is designed to be shared in a companywide Teams channel as soon as Microsoft releases an upgrade that's in the road map for early 2022.

The logo for Wipfli, featuring the word "WIPFLI" in a bold, white, serif font centered within a solid blue rectangular background.

WIPFLI

The newsletter prior to any changes

There were no set categories; they changed from week to week. The top graphic and the font were unrelated to any Wipfli branding. "Insite" refers to the name of Wipfli's intranet and reflects old branding.



M&A announcement

- In last Friday's special edition of [The Link](#), Kurt Gresens announced that Portland, Maine-based consulting firm Tidestone Solutions joined Wipfli.

COVID-19 updates and resources

- Kurt's [video message](#) last week addressed the Pandemic Response Check-In results and shared some encouraging words. (WFA: Click [here](#).)
- A [new emergency offerings](#) resource page has been created to help you guide your clients through the pandemic. You can find this page by clicking "COVID-19" on the top banner of Insite and finding "Emergency Offerings."

Open Enrollment

- An upcoming [Open Enrollment](#) period for supplemental life insurance will be held from Wednesday, May 20 through Wednesday, June 10, 2020, with benefits effective July 1.

Firm news

- As the firmwide move from Skype to Teams approaches, [here](#) is an update on training dates, timing for the rollout and what to expect.
- Click [here](#) to see the top features of the new D365 2020 Wave 1 release applied last Friday. **Note:** The web UI (Sales & CRoPs) was not be impacted by the update.
- Wipfli Financial [Insight investment letter](#): During challenging times, commitment gets tested.

Professional development

- Monday Morning Leadership [discusses](#) how feeding your brain daily with the right things can boost your energy, happiness and motivation. (WFA: Click [here](#)).
- Strengthen your Core – [learn](#) what it means to be exploratory and how curiosity can benefit you.
- The *Outward Mindset Work From Home* Series is a compilation of short videos sharing how Wipfli associates are using an outward mindset to get through these ever-changing times. Search for videos using #outwardmindsetWFHseries on [Yammer](#) or find them on Talent Development's [Stream](#) channel.
- If you missed last week's #CultivatingConnections on Yammer, [check out](#) this summary. These resources have been curated by our Talent Strategy team to examine topics like leadership development, performance coaching, personal well-being, inspirational stories and working from home.

The first iterative change

The header graphic aligns with Wipfli's brand identity and incorporates the new logo. We introduced set categories to help associates quickly skim the news for things that matter to them.



Firm news

- Reminder: You have until this Friday to [submit your questions](#) for the May 5 quarterly firmwide meeting. This is your chance to have your voice heard.
- I3T is restricting access to D365 notes and activities to protect data entered through the Tax Hub, Service Hub and ITSM Service Desk. Click [here](#) to learn more on how this will impact your D365 experience.
- A planned network outage is scheduled for April 24, 9 p.m. to April 25, 2 a.m. CST. Here are the Wipfli applications that will be [unavailable during that time](#).

Thought leadership from the firm

- As we hit the one-year anniversary of the market trough of 2020, WFA CIO Rafia Hasan takes a stab at answering a question on many investors' minds: [Will inflation rise in 2021?](#)

Firm culture

- Women of Wipfli invites you to sign up for:
 - [Poker Powher](#) - choose between a national event on April 22 or May 26.
 - [Conversation Circles](#) - the remainder of April will focus on generational communication.
 - Check out their [Insite page](#) regularly for new content and more events!
- Biplob Deb is a seasoned tax pro with a knack for breaking down complex tax laws and applying them to clients' specific situations. Get to know him in our [Associate Spotlight](#).
- While we continue to explore ways to feature and welcome associates, you might see some new faces on Yammer: Take a minute to meet [our 2021 interns!](#)

Learning and development opportunities


- The first two sessions of SkillUP Wipfli: Presentation Advantage are now filled. Click [here](#) to join the waitlist and you'll be notified via email when new session dates are launched.
- Monday Morning Leadership: Great leaders know that humility and an open mind are key to innovation. Here are 7 things you can do to keep your mind open and curious ([Wipfli/WFA](#)).

Wipfli in the media


- Partner Dan Pichler received the [Faith That Works](#) award from the Catholic Diocese of Green Bay: "What's worked for me all these years is to be the person who I am. My faith has always been a part of that."

The current Wipfli Weekly (upper section)

This iteration strengthens brand identity, including our fonts, and is visually aligned with our Intranet. We've reduced content to 4 main stories per week; each story is hotlinked to drive readers to the Intranet for news. We've seen a 100% increase in clicks to the Intranet as a result of the new Wipfli Weekly.




Wipfli Weekly | October 19, 2021



CPM update: We are close!


We are making great progress as we come up on the revised deadline of Oct. 20 for client recommendations. Here's how to focus efforts as we near the finish line.



U.S. associates created lasting, positive impact: COVID relief in India


Associates added nearly \$50K to the firm's \$25K donation to support humanitarian efforts. See the impact and share this LinkedIn post from Right to Live #MyWipfli

Read the original [insite story](#) about the donation



Mental health: How we navigate it in our professional and personal lives

Join the discussion on Oct. 22 to break the stigma around mental health and hear from Wipfli associates who have experienced these challenges.




Hear from Wipfli leaders in 30-minute skill-building sessions

Learn mad skills from networking to the value of self-awareness in just 30 minutes! Sign up for the Wipfli Leadership Capability Building series today.

The current Wipfli Weekly (lower section)

We've added a "reminders" section for things that have already received coverage but need an additional plug. We started doing weekly associate profiles on the Intranet and we feature them in this section.


The firm strongly supports learning and development, so upcoming opportunities are detailed here along with links to external stories and thought leadership from Wipfli associates.



Building series today.

Reminder

- The Administrative Services team has consolidated support requests and information about their services [on Insite](#), which include formatting proposals, developing presentation decks, assisting with RFPs and much more.



Associate Spotlight: Michael Voegtline

Michael Voegtline has held many different positions in his 19 years with Wipfli, preparing him to move the firm forward by leading an efficient HelpDesk.

Wipfli in the media

- Partner Grant Eve was [featured in the Global Gaming Magazine](#) to address the important role Wipfli's CasinoEdge has in helping casinos navigate the dynamic compliance landscape.

Learning & development

- Featured LinkedIn Learning course: [Well-Being in the Workplace](#). Here are some practice techniques to alleviate anxiety, worry, stress, and other common mental health issues.
- Monday Morning Leadership: "Predictors" can help us achieve our goals. Want to learn how you can use them? [Here's a simple challenge to put into action for yourself right now.](#)
- LAST CHANCE: Sign up for SkillUP Wipfli's Oct. 20 Masterclass to learn [how you can design your elevator pitch.](#)

[Go to Insite](#)


We the curious.

 [Get the SharePoint Mobile App](#)

Stories link to Insite; we added the button for an additional CTA.

"We the curious" is our brand statement and we include a CTA to encourage associates to move to mobile with their Intranet experience.

This shows the entire Wipfli Weekly alongside screenshots of our Intranet to illustrate how they align.



Wipfli Weekly | October 19, 2021

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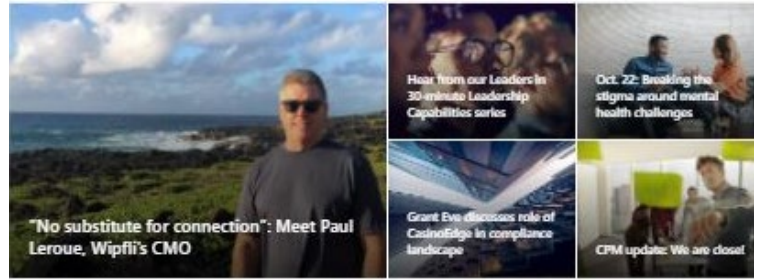
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- Monday Morning Leadership: "Predictors" can help us achieve our goals. Want to learn how you can use them? [Watch a 5-minute challenge to get into action. See yourself right now.](#)
- LAST CHANCE: Sign up for SkillUP Wipfli's Oct. 20 Masterclass to learn [how you can elevate your advisory relationships](#).

[Go to Insite](#)



News @ Wipfli [View all](#)



Wipfli Financial Advisors
Insight: Stock market predictions and the things we know we don't know

"There are known knowns. We also know there are known unknowns. That is to say, we know there are some things we do not know, but there are also..."

Diversity Equity & Inclusion
Fall Regional Social Events hosted by Wipfli
Join your WOW Regional Chapter in October and November for a virtual social event! Use the event to...

Benefits
Open Enrollment for 2022 is quickly approaching!
Open Enrollment for 2022 benefits starts November 8. This is your annual opportunity to review...

Wipfli Financial Advisors
Community conversations: Katie Cullen, chief strategy and...
According to Katie Cullen of Wipfli, Financial Advisor, successful leaders take chances, empower others and...

Conversations @ Wipfli: Well-Being Photo Challenge

Start a discussion

Hammond, R...
How do I lift the... | 10 | 8/21

CONGRATULATIONS Wipfli! Screenshot you are the lucky winner of week 1!

Thank you for all the wonderful pictures sharing how you do well-being more

[1 attachment](#)

Intranet home page ↑

↓ all news page

WIPFLI | SharePoint | Search this site

[Insite Home](#) | [Quick Links](#) | [Partner Access](#) | [Associate Roster](#)

News @ Wipfli

Page details | Analytics | Published 6/16/2021 | Edit

Firmwide | [See all](#)

- Wipfli Financial Advisors**
Insight: Stock market predictions and the things we...
There are known knowns. We also...
yesterday
- Wipfli Financial Advisors**
Community conversation: Katie Cullen, chief strategy and...
According to Katie Cullen of Wipfli...
yesterday
- Firmwide News**
"No substitute for connection": Meet Paul Leroue, Wipfli's Ch...
Get to know Wipfli's new CMO, Pau...
2 days ago

13T | [See all](#)

- 13T**
Running into the "You can't get there from here" error...
Do you encounter the "You can't ge...
6 days ago
- 13T**
Check your inbox: 2021 security awareness training
Every year, Wipfli associates are...
October 7
- 13T**
October Q&A: Wipfli's Technology Roadmap...
Technology Partner Michael Pynch...
October 1

Learning & Development | [See all](#)

- Learning & Development**
Leadership Capability Building Series launches new format...
Each session features a Wipfli lea...
6 days ago
- Learning & Development**
Learn on your own time with Becker self-study courses
Want to expand your subject matte...
September 29
- Learning & Development**
Outward Mindset workshops
What sets us apart from other firm...
September 16

Culture | [See all](#)

- Diversity Equity & Inclusion**
Facilitator Information Sessions: WOW Conversation...
Have you felt called to be a bigger...
2 days ago
- Culture**
Your donations in action: Right to Live, India (COVID relief)
Associates added nearly \$50K to th...
October 14
- Diversity Equity & Inclusion**
Fall Regional Social Events hosted by Wipfli
Join your WOW Regional Chapter in...
October 8

Benefits | [See all](#)

- Benefits**
Open Enrollment for 2022 is quickly approaching!
Open Enrollment for 2022 benefits...
October 5
- Benefits**
Wipfli profit-sharing contributions for FY21
Our associates make Wipfli what it i...
September 16
- Benefits**
New Client Incentive will be retired May 31, 2022
After review of the effectiveness an...
August 25

Wipfli in the Media | [See all](#)

- Wipfli in the Media**
Grant Eve discusses pivotal role of Wipfli's CasinoEdge in...
Partner Grant Eve was featured in th...
September 16
- Wipfli in the Media**
Alex McBride featured as Rising Professional in AACSE...
Alex McBride is a construction...
August 25
- Wipfli in the Media**
Brian Blaha and Adam Herman talk Wipfli business and cultu...
"Wipfli and Mueller Proff have bee...
June 25

Archived News | [See all](#)

- Wipfli careers: Curiosity lives here**
Watch later | Share
- Wipfli**
Ask Monique: Health educator and chef Monique Costello answers our well-being questions
- Wipfli**
Monday Morning Leadership: Are You Present?

Our team has many talents + perspectives

We the curious.

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