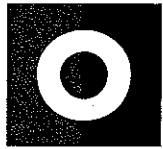


MARKETRENDS

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Motivating the Motivator

By Lisa A. Rozycki, LR Marketing Group



ften the marketing director is the head cheerleader in the firm. He or she is the chief motivator; praising, recognizing, and rewarding employees for a job well done. They motivate professionals to succeed with their personal marketing plans and goals. They are often the director of fun; organizing parties and morale-building activities to motivate staff during stressful times.

Yet, even the most enthusiastic of them can feel unmotivated at times. What happens when the head cheerleader, the marketing director, needs some motivation? I surveyed some marketing directors to find out.

First and foremost, motivate yourself

"I don't think I have ever sought out motivation from my partners or team members. I am a self-starter and try to self-motivate," says Rose Breuss, Chief Marketing Officer of McGowen, Hurst, Clark & Smith, PC, West Des Moines, Iowa (2 offices, 10 partners, 70 total staff).

"The accounting marketing position seems to attract people who are eager to contribute to their firm, sometimes to a fault," says Jack Kolmansberger,

Marketing Director of HERBEIN + COMPANY, INC., Reading, Pa. (3 offices, 20 partners, 104 total staff).

The key is to find out what motivates you. Then do it on a regular basis. Are you motivated by creativity, career development, money, recognition, learning? Sit down and make a list of everything that motivates you. Then set a goal to accomplish each of them on a regular basis.

Find inspiration

Do you work for a person who is a de-motivator? It is hard to feel good about your job if the person you report to is either disinterested in your position, unmotivated, or has a huge workload that occupies most of his or her time.

Believe it or not, a non-creative person can also be a de-motivator in and of himself.

"Accountants think in rows and columns and thus every discussion and project needs to be framed that way," says Elizabeth Storey-Bono, Director of Marketing and Business Development at Concannon Miller & Co., P.C., Allentown, Pa. (2 offices, 13 partners, 68 total staff). 'Creativity' seems to be a derisive word, although often they call

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Letter from the President



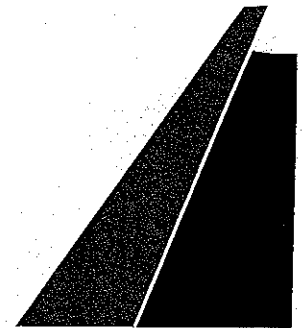
D. Scott Moore

Dear fellow AAM members,

When I attended my first AAM Summit nine years ago in Toronto, I knew I had become part of something very special.

There was a unique combination of energy, intellect and camaraderie that was unlike anything I had experienced in similar venues. I left brimming with new knowledge, ideas and connections that would continue to grow, year after year, contributing enormously to my professional growth.

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me in on some of the most difficult business issues they face. This, they attribute to business acumen, but do not link creative thinking to that.”

“We’re naturally inclined to extend beyond typical marketing functions,” says Kolmansberger.

One of the ways to stay motivated is to find a support system that you can feel inspired by whether it is inside or outside of your firm.

“An amazing leader is imperative to succeeding in a marketing role,” says Michelle Class, Marketing Director of Barnes Dennig, Cincinnati, Ohio (one office, 16 partners, 100 total staff). “Without it, you might as well bury your head in the sand and simply be a tasker,” she says.

“Having a support system is invaluable,” says Kolmansberger. “Obviously, you’d like to gain motivation from your boss. Getting feedback is invaluable, and I’ve never shied away from asking how they perceived things to be going,” he says. “If your managing partner is disinterested in marketing, it’s nearly impossible for them to provide any motivation, which is where self-motivation must kick in. The strongest way to motivate marketers is to embrace their place in the firm, support them with others, provide acknowledgement of their value, but also continue to challenge them,” he says.

“When I seek motivation in my role, I go to other marketing directors at CPA firms and marketing consultants to bounce ideas,” says Jill Lock of Isdaner & Company, Bala Cynwyd, Pa. (one office, 8 partners, 66 total staff).

“I always encourage people to reach out to other AAM members,” says Kolmansberger. “We all face similar challenges and AAM can be an incredible resource for when you need a boost or just a reality check.”

“Generally I go outside the firm to other creative thinkers,” says Storey-Bono. She sits on the board of a non-profit organization and serves on the marketing committees of two major organizations in her community. “Quite a few top level marketers are on these committees and it is inspiring,” she says. “I get to vet my thinking, bring new ideas to the table that I don’t get to do with accounting, find resources in the community, and get a fix of creative networking.”

“Kenneth Guidry, President of Pannell Kerr Forster of Texas, P.C., Houston, has mentored me since I began at this firm more than 10 years ago,” says Karen Love, Director, Practice Growth (one office, 12 directors, 145 total staff). “However, there are some specific instances when it is more appropriate to seek additional counsel outside of the industry and our firm. On these occasions, I rely on my relationship with a business coach who assists me with the ‘vetting’ process,” she says.

Express yourself

We all like to believe that our opinions matter. A key motivator for all of us is to be taken seriously by the leadership in our firms. Are you encouraged to express ideas and offer suggestions, even if the feedback isn’t always easy for your partners to hear? If there is not a safe and productive environment in which to express your opinions, then maybe you should have a conversation with your managing partner expressing this concern.

“The biggest de-motivators are when people are not open to new marketing ideas or don’t see how marketing can have an effect on the big picture or devalue marketing activities,” says Lock. “I go about resolving this with more communication, understanding, education and patience,” she says.

“If the marketing department is not hearing ‘no’ then we are probably not pushing ourselves enough,” says Kolmansberger. “Knowing that your boss will support you when some partners may disagree with a course of action is a huge motivator – that’s when you know you are really a key team member,” he says.

Create a positive environment

Enthusiasm is contagious. Create an atmosphere that exudes positive energy. Never engage in gossip and discourage others from doing so as well. Keep your office doors open and keep yourself approachable by staff who are looking for marketing help. The more positive your environment, the more motivated and productive you and your staff will be. Find ways to promote the benefits of marketing and practice development.

“Leading the practice growth team of PKF Texas is a daily joy for me. It is an unbelievable blessing for me to work with this group of talented folks,” says Love.

“I enjoy reaching out to everyone on the staff to educate them on what marketing means to their careers,” says Kolmansberger. “Whether it is a formal training session or a brief staff meeting, I want to reinforce that marketing can be interesting and challenging, yet also rewarding and fun,” he says. “Marketing is a quick way to stand out in the CPA pack – not every partner is going to necessarily know which staff is technically proficient, but they will all know when a non-partner brings in new business.”

Lobby for a bonus system

Marketing directors across the country are lobbying for goals and bonus systems tied to performance to motivate them. Some have a percentage of their salary tied to performance goals. Others have goals that are tied to a percentage of net revenue.

About the Author:

Lisa Rozycka is the founder and Principal of LR Marketing Group, a marketing consulting practice specializing in growing revenue of professional service firms through market analysis, planning and implementation, public relations, lead generation, and business development. Lisa has more than 28 years of marketing experience and has spent half of her marketing career working in the public accounting industry. She can be reached at 610.582.0097 or lisa@lrmarketinggroup.com.

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"Bonuses that are tied to specific goals and achievements are most satisfying," says Kolmansberger. "At the very least, knowing where you slot within the bonus structure shows where your value is perceived."

"Currently, a percentage of my salary is tied to goals in our bonus system," says Class. "Since they are overarching, big

picture goals, they simply guide me to succeed on the things that matter most to the firm," she says. "At times of economic struggle, these goals have changed a little, but that simply means we are moving our marketing efforts in the right direction for the future of the firm."

No matter what size the firm, being motivated is critical to a marketing professional's success. And seeing their team members succeed in their marketing and selling efforts by bringing in

new clients or selling new services to existing clients gives these marketing professionals the most satisfaction in their roles in the accounting industry.

"I get the most satisfaction in my position when people 'get' marketing and see the positive influence and value it can have in their career and professional development," says Lock. "When these people become my advocates, I know my message is being received." *M*

Ready, Set, Move to Action

By Katie Tolin, Rea & Associates, Inc.

To motivate is to move to action. Marketing is all about motivating. You motivate clients to use your services. You motivate prospects to buy. You even motivate internally to get partners to sell. Whether you realize it or not, you're in the motivation business.

While many people believe you need to provide incentives to get people to take action, that's only part of the solution. In professional services marketing, some of the key motivational tools may be simpler than you think.

Start with a carrot

Motivating partners can be a challenge. Some respond to sales goals and incentive programs. Others won't change the way they do things, period. However, your success depends in part on theirs. Start by focusing on those partners willing to work with you. Witnessing how you can successfully help one partner may be just the thing other partners need to get motivated.

When Rea & Associates encouraged partners to reach out to each other to identify cross selling opportunities, many resembled deer caught in headlights. The marketing team worked with one individual partner to develop internal sales material and encouraged him to travel to each office to talk about the benefits of the service along with characteristics of potential buyers. When that

partner returned with leads equating to \$500,000 in revenue, other partners jumped on board.

Keep a stick handy

It also helps to make sure you have support from the top. When you aren't getting something needed from a partner, nothing will drive results more than a call from the managing partner. While calling in the cavalry isn't something marketers want to resort to very often, that little extra help with a strategic project will help give you credibility.

How? Because it reinforces the fact that you are working closely with the managing partner and that he/she personally supports what you do. This tactic is so effective you probably won't need to employ it more than once.

Think like a CPA

While marketers see in color, accountants often view things in black and white. Your partners have probably made comments like, "we don't need another checklist or form," but the truth is they are accustomed to using these types of tools. If you develop easy to use tools that leave little room for confusion, they will use them.

At Rea we developed a custom program to serve as our opportunity pipeline and put it on the firm intranet. If a person can make a purchase online, they can use the pipeline. By making this tool

form-like and easy to navigate, partners add and update information themselves. Since it's found in a public place, partners feel more accountable. As a result, the process is totally automated and requires minimal marketing support.

Work as a team

No one wants to let a team member down. It's human nature to want to look good in front of peers. If you can get your partners – and everyone in your firm for that matter – to view marketing as a team sport, you'll have more success.

Nowhere is this more proven than in opportunity pursuit. If you only have one partner chasing a prospect, you aren't utilizing the full depth of knowledge and experience in your firm. Discuss strategy and next steps with a team of people. Incorporate their best practices and learn from their past mistakes.

We had eight people on the pursuit team for a large group of family owned entities, including partners, managers, marketing staff and even the CEO. Help from the family's investment advisor was also solicited to help steer them in our direction. While there was one partner who led the opportunity, everyone contributed in some way. By pulling in the strengths of multiple people, a successful strategy was planned and executed. And the partner leading the efforts recognized that he could not have done it alone.