

Retaining Your Marketing Director

By Jill R. Lock

Now that you found that terrific, exceptional marketing professional, after dozens of interviews and months of searching, the key is to retain that professional. In the early 1990s, the average tenure of the marketing director at a firm was 13 months. **Jean Marie Caragher**, President of **Capstone Marketing**, conducted surveys in 2004 and 2006 that show the marketing director's tenure has increased to about four-and-one-half years.

The increase in the tenure of the marketing director at an accounting firm came as a result of a more sophisticated understanding of marketing and the sales cycle. As marketing became more commonplace in the professional work environment, partners were better able to evaluate and articulate their marketing needs.

How can firms facilitate a long relationship with their marketing directors? What makes marketing directors want to stay at their firms?

An eight-year veteran at her firm, **Linda Slothower**, Marketing Director of the **Contryman Solutions Group** (60 employees, 12 partners), states, "Most of the people on our management team make me feel that I am a key part of leading a successful firm." Linda also likes the variety of projects and the people.

Anna Marks, Director Public and Client Relations of **KFMR** (30 employees, 5 partners), has been with her firm for over six

years. "The reasons I stay at my firm are because of the partners' respect, latitude to present and execute new ideas and public recognition of my contributions. They, overall, have placed me in a position of leadership."

"I have stayed with Grant Thornton for nine years because of their *Guiding Principles*, which we lovingly call *ripple (RIPL)*," says **Linda Garvelink**, National Director of Industry Marketing for **Grant Thornton** (5445 employees, 489 partners/principals). Linda continues to explain *RIPL*, which stands for Respect, Integrity, Professional Excellence, and Leadership. "The partners respect and use my input, provide clear guidance and input on technical issues. They treat me as an equal. The firm strives for a high level of integrity; I am completely comfortable with the culture. They support my efforts to help the industry marketing staff develop their professionalism and skills. We have excellent leadership, and they also recognize and use my leadership skills. Other reasons I have stayed with the firm include the wide variety of assignments and high level of independence I am given to manage the team. I have always felt I am a highly valued employee and have a great staff and wonderful team of colleagues."

Eileen Monesson, Marketing Director at **Cowan, Gunteski & Company** (53 employees, 10 partners) is a veteran in the accounting industry, with over 15 years of marketing experience. She has been with her present firm for over two years

and has plans to remain long term. What is it about her firm that she likes? Eileen explains, "I am on the managerial level, and they treat me as an equal, with the same rights and responsibilities as other managers and advancement options such as becoming a partner or chief marketing officer. I have the opportunity to voice my opinion and participate in events. The marketing voice counts."

Another Marketing Director that plans to have a long term relationship with her firm is **Vickie Hicks of Kirkpatrick, Phillips & Miller CPAs** (66 employees, 12 shareholders). Vickie has been with her firm for three years. She explains the positives of working at her firm: "The shareholders value a marketing culture, commit to implement various marketing programs, and support my efforts financially. They acknowledge my accomplishments. I am welcome at the shareholders' table and have a lot of fun working at our firm."

"You need a level of commitment from partners. Partners should respect the marketing professional and take the marketing professional's advice about business development follow up and implement programs. They should be willing to listen and try new ideas," suggests **Adam Wolf**, Director of Marketing and Business Development at **Grassi & Company** (100 employees, 10 partners). He has been with his firm for six months.

Stella Oefinger, Business Development Manager of **Goldin**

Peiser & Peiser, LLP (25 employees, 4 partners) is a four-year veteran at her firm. Stella stays because of the validation she receives from the partners and the variety of services in which she is involved. Her partners realize how vital marketing is to their business. She feels like she has true ownership, with a competitive compensation package and an incentive bonus based on the firm's overall success.

"Listen to the marketing director's recommendations," states **Sue Zisko**, Marketing Director at **NSBN LLP** (75 employees, 18 partners). Sue has been with her firm for almost four years. "Give your marketing director access and visibility with the partners. Let your marketing director be creative and support the programs fiscally. Be patient and willing to wait a bit for results. CPA services are a long-term sell. Managing partners should be available to meet often, give feedback and serve as a sounding board for plans and ideas. Create a wonderful working environment, foster a friendly workplace, give generous bonuses and gifts and be understanding of flex-time requests. Make partnership an option."

Molly Dore Farrar, Director of Marketing at **Peterson Sullivan PLLC** (65 employees, 10 partners) thinks the most successful marketing professional in a professional service firm needs at least one champion at the partner level. Molly explains, "This 'buy-in' is essential at the partner level because it creates an environment where marketing has already been set as a priority and leadership is committed to marketing. The marketing partner champion

here at Peterson Sullivan understands professional service marketing and believes it is essential at our firm. This attitude allows me to do my job without the resistance that I normally would have if I did not have the partner buy-in, which ultimately makes me happy, feel successful in my position and makes me want to stay in my position!" Molly has been with her present firm for over two years.

I am going on four years at my present accounting firm, **Isdamer & Company, LLC**. I have worked in the industry for over 20 years. I look forward to a long relationship with **Isdamer & Company, LLC** as the Director of Marketing.

The managing member (partner), **Scott Isdamer**, at our firm (64 employees, nine members) makes me feel valued. He is my main champion. Scott listens to my recommendations, shares long-term goals and supports marketing initiatives. Other members seek my input and appreciate the initiatives. I am fortunate to have other champions at **Isdamer & Company, LLC**. As a result, I am able to excel in my position and contribute to the firm.

What can accounting firms do to enhance their existing relationship with their marketing professional? Feeling valued and being put in a leadership position are essential factors in retaining marketing directors. All interviewed agreed on these two components. Find out what else is important to your marketing director. Determine what he or she needs to be successful in the position. Support the marketing efforts and make a commitment

Three Key Ways to Support Your Marketing Director

- Be a huge fan of your marketing director
- Understand that marketing strategies take time and commitment
- Celebrate and acknowledge the marketing professional's contributions
- Include the marketing professional in your management team; give the professional the authority needed to do the job

at the top. Accounting firms can retain marketing directors by realizing he or she is a crucial part of the team and giving that professional a seat at the management table. Provide the professional with the authority needed to do the job. Use the professional's expertise in marketing—don't ask the professional to do administrative work. Get the most from your marketing director, and take advantage of the skills offered. Give the professional the necessary financial, administrative and technological support. Have realistic expectations, and be patient. Understand that success takes time, buy-in, implementation and follow-up. Acknowledge and reward the professional's accomplishments. Be committed to the marketing plan. Respect the expertise of your marketing director. Be careful to stay on track, especially after you listened to what the last person you sat next

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to at a networking function did at their firm. That idea might work at that firm, but may not work at yours. Your marketing director is there to develop a unique marketing program that fits your firm. Stay focused on the program that complements the strengths of your firm.

You took the time to hire an extraordinary marketing person. Let that professional do what you hired him or her to do. Have confidence in the creative knowledge this individual brings to your table. Keep your marketing director in the loop. Share the strategic plan with the professional. Involve the marketing professional. Make the marketing director an insider. By being included and valued as a unique member of the management team, your marketing director will be able to truly facilitate the firm's growth.

The accounting industry has come a long way with the integration of the marketing professional. Partners have more reasonable expectations of the marketing director's role and are strong proponents of the marketing message. They realize that marketing is an integral part of the practice.

About the Author: Jill Lock is the director of marketing for Isdamer & Company, LLC in Bala Cynwyd, PA. She joined the firm in 2003. Prior to joining the firm, she was the director of marketing at three other regional accounting firms. Jill has over 20 years of experience as a marketing professional. Jill can be reached by phone at 610-668-4200 or by email at jlock@isdamerllc.com. †