

Understand the Firm Culture to Build Support for Marketing



Jill Lock

As marketing director for four different accounting firms, I have had the opportunity to observe first-hand how each accounting firm has a different culture depending upon the shared values, traditions and policies of the firm. The culture may be family-friendly, client-focused, consensus-based, laid back, risk-taking or hierarchical. As the marketing professional, understanding the firm culture is crucial in facilitating marketing activities and getting involvement from partners, managers and others. Remember, it is your responsibility to investigate the existing culture and then develop a marketing plan that will work.

Assess the Landscape

A critical aspect of building support for marketing is to understand firm politics and relationships among leaders and departments. You need to identify who has authority and power in the organization, as their support will help the marketing professional spread the marketing message and convey its value. Being politically connected and having those with authority and power buy into marketing helps to build a strong network of marketing advocates. These leaders later will be enlisted to aid in spearheading the marketing initiatives.

To identify these opinion leaders, I typically meet one-on-one with the partners and ask them who the influential opinion-setters are in the firm. Before I am hired into a marketing position, I set the expectation that I will attend at least a portion of each partners' meeting. At these meetings, I observe the dynamics: Who is really running the meeting? Who commands the attention of the other partners? The same goes with non-partners. Whether in departmental meetings or simply sitting in the lunchroom, I notice who seems to have influence.

Next, employ your opinion and management leaders in the firm to communicate the marketing message, which helps to send a strong message about the importance and value of marketing. To do this, I first gain an understanding of what their marketing strengths are, and then I recognize their successes.

I survey employees to find out what their experience with marketing has been. Some of the questions I ask include: What is their definition of marketing? What are their goals? Which activities are they willing to contribute to or participate in? Which organizations are they involved in? How do they believe marketing can help them? I also talk to supervisors to find out what each individual does well and what clients are saying about them.

As you're asking these questions, see who supports the marketing program and how much enthusiasm they show. Finding out who your advocates are will help you build support.

Recognize Successes

At this point, you are in a position to start building on the strengths you've identified by recognizing those leaders when they have successes in those areas. For example, we have a weekly *Marketing Matters* e-newsletter, where we talk about marketing activities, such as employees' networking and speaking engagements. We also hold quarterly lunch-and-learns and an annual marketing banquet where the managing partner recognizes those who go above and beyond in marketing or client service.

Sharing information about what others are doing, especially the opinion leaders, builds interest in and reinforces the value of participating in marketing activities. Recognition among peers for participation in these activities encourages others to participate, because it shows them that those activities are valued and that this is something they can do, too.

Education Can Be Fun

Once you have the opinion leaders communicating the marketing message and support for marketing is starting to build, make sure employees know about all of the firm's services and areas of expertise.

At Isdancer & Company, we held a speed networking event to educate staff about different departments' and employees' areas of expertise. Each pair was given specific questions to prompt the other person about his or her work and accomplishments.

The pairs rotated every 10 minutes, and by the end of the session, each person had talked to six different people in various departments with different levels of expertise. Employees told me that the event helped them get to know one another and understand the value each person provides.

Our group is competitive and likes to have fun so we also have used games to help educate our staff. We have played Jeopardy, What's My Line?, Monopoly, Family Feud and Wheel of Fortune to aid in understanding our services, industries and clients served.

Break It Down

In the beginning, you'll need to make it as easy as possible for employees to do marketing. Sometimes you may need to do it for them and show by example the best way to market in a given situation. For example: When a client appears in the newspaper for a milestone, write a congratulatory letter for the employee that he or she can send to the client. Invite newer associates to join you at meet-and-greets with bankers and lawyers so you can show them how to network.


Then encourage them to take small steps in marketing, with you as the guide. Provide training on the 30-second elevator speech for networking events, and tips on how to network and be a better communicator. In addition to you leading the training, you can invite outside experts to discuss various topics. (This builds on what you have said and improves the credibility of the message.)

Building on Success

In a more mature stage of developing the marketing culture, it is wise to implement a program of personal marketing plans. This is a plan that is tailored to each employee depending upon their responsibility at their firm, their interests and goals.

Also in the more mature stage, consider incorporating marketing measures into each employee's evaluation. At Isdaner, in each employee's annual evaluation (whether it is an administrative person or an accountant), there is a marketing component with a list of specific activities in which the person is expected to be involved.

Education, training and communicating best marketing practices should be ongoing. The message may get more sophisticated in time, but don't forget the slow learners and the new employees who must be brought into the fold.

Remember to be creative and have fun, and your team members will soon see that marketing does not have to be feared; it is not hard to do and may even be enjoyable. 

About the Author

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