IN MARKETING

Here's how to find your point person.

By Jeff Stimpson

"At the time we started with a marketer, we had a good reputation, but no brand image, no marketing culture, no awareness in the market, and a very unpolished presentation," says partner Bill Hogan of Chicago-based John R. Waters & Company. "We were still a small firm, but were having success recruiting great people. To keep them, I knew we would have to provide them with a career track. To do that, we had to grow. Given our structure, I knew that I couldn't do it alone, and would need the help of a marketer."

Now, three years later, Waters has almost doubled in size, created a solid image in the marketplace, honed a more polished presentation, and developed a marketing culture internally.

"I remember during the interview warning Linda Forbes, our marketing director, that she'd be expected to start a new department, and that while the partners would support her, she was expected to do most of the heavy lifting," recalls Kevin

O'Connell, managing partner of Macias Gini & Company, Walnut Creek, Calif. "We'd never really focused on marketing prior to Linda's arrival. Each of our partners had a good sense of their local markets and did a great job generating new business. Working with Linda, we started to realize that marketing is more far-reaching than generating new business. She's helped us to create a comprehensive marketing plan that integrates with our overall strategic plan for the firm. We've worked on our more foundational areas, improved our messaging and our internal and external communications, developed better lead tracking, created more professional collaterals, had greater coverage in the media, and the list goes on."

"If you want pretty printed materials, hire a graphic artist," says Lyne Noella, director of corporate strategy at California-based Stonefield Josephson. "If you want a thoughtful strategy that combines a firm's internal talents with market opportunities, and someone who can help you make your ambitious goals happen, then you're ready for a marketing professional."

AN ESTABLISHED POSITION

Accounting may be a culture of conformity and compliance, but marketing is "a high-energy, fast-paced culture of innovative ideas and aggressive initiatives, where failure is a part of the business," writes consultant Troy Waugh in his book *Power Up Your Profits, 31 Days to Better Selling for Accountants* (published by Wiley & Sons). At the least, marketers can produce marketing collateral, handle logistics of seminars and newsletters, and produce leads and prospects, Waugh confirms. "They may even be able to train you and your staff on customer service or sales. But they aren't you," he writes, adding that properly using marketers takes awareness and planning. You need to train yourself to use marketing help effectively, and you need to make sure you have the right person who can work with you. Marketers see the huge void of marketing talent in the profession. But they don't see the minefield of conservatism."

Three Quick Tips

Consultant Gale Crosley gives a number of pointers for making the most out of your marketer. They include:

1. Change the title from "director of marketing" to "director of practice growth," which is reflective of the more enhanced role and expectation of the next generation of directors of marketing;
2. Include them in all partner meetings of strategic content, even if only as an observer;
3. Ask your director of practice growth to re-write their job description, goals, and compensation scheme. Tie their goals and compensation directly to practice growth.

Anecdotal evidence, he adds, indicates that the tenure of a marketing coordinator or director averages some 13 months. Within the past few years, several high-profile marketers have moved on from large regional firms, and others have expressed intensifying frustration at partners' limited perceptions of marketers and marketing at firms.

Nonetheless, the idea is evolving and taking root. As at many firms, at Cowan, Gunteski & Co., Toms River, N.J., marketing was initially divided among various members of the firm, from a partner-in-charge of marketing, to various niche leaders, to members of the firm's administrative team, according to Donald Cowan, managing director. "This worked great when we were a small firm in one market," Cowan says. "As we expanded, we realized that we needed a professional marketer to take us to the next level."

CG hired a marketing coordinator in January 2004, and then a marketing director, the latter with 22 years' experience in marketing and sales of professional services industry, six of which were with a competitive accounting firm. "It was important that this person worked in and understood our market," says Cowan. "We wanted someone who had established relationships in our community, and could leverage those for the benefit of the firm. We wanted to learn from that person's expertise, not teach them how to go about marketing accounting and consulting services."

Marketing director Sarah Johnson of Waters started as an intern at the firm, and was hired out of school. Hogan explains that Waters looked for "a self-starter who took initiative, and who could execute and implement ideas. Since we didn't have a marketing program in place nor a marketing culture, these characteristics were extremely important."

Elizabeth Galambos, first-ever marketing coordinator at Brott Mardis & Co., in Akron, Ohio, also began at the firm as an intern while a college senior studying marketing at the University of Akron. "Within two months of my coming on board, it was clear to everyone that this was definitely a full-time position. In fact, last summer we hired a part-time marketing assistant intern."

Lakeland, Fla.-based Carter, Belcourt & Atkinson has had two directors of marketing in its past 20 years, the current being Jayne Bates, who is also the incoming president of the Association of Accounting Marketing. She says CBA's first marketing director was one of the founding members of the original version of AAM.

Rare among accounting marketers, Bates was also a CPA and an audit senior with the firm, with almost eight years' experience. "I initially thought that I could handle marketing and auditing," she recalls, "but quickly found that marketing couldn't wait for two weeks while an audit was been done."

Atlanta-based Frazier & Deeter hired its first marketing director more than 15 years ago, according to David Deeter, managing partner. The current director of marketing, Erinn Keserica, joined the firm almost five years ago. "We were looking for a person who could really leverage the Frazier & Deeter name in the market," says Jim Frazier, Jr., a founding member of the firm. "At the time, David Deeter was starting his role as managing partner, so this person needed to be able to communicate and understand his vision. With over 400 applicants we made a strategic decision to go with the person who had enthusiasm, a solid marketing foundation, and coincidentally, no professional service marketing background."

Bob Keiter, principal in charge of marketing at Keiter, Stephens, Hurst, Gary & Shreaves, in Glen Allen, Va., says his firm hired its first marketer in October, 2001, and nabbed an individual with more than three years' experience marketing CPA firms. "Initially, we expected our marketer to coordinate our collateral, proposal development, client events and seminars, and marketing reporting," recalls Keiter. "Through the past four years, our marketer has also implemented a networking curriculum for our staff, has become more involved in our referral source and business development efforts, and is involved in niche strategic marketing planning."

Sally Glick, marketing officer and director of marketing consulting services, is the first marketing professional for Livingston, N.J.-based Sobel & Co., a firm of more than 65 professionals. "They are ready to have a more structured marketing process," says Glick. And when a firm is ready for a marketer is a matter not of size, says Glick, but attitude.

At the least, firms need a marketer who can write well, work with the media, understand event planning, and help with PowerPoint and other presentation tools, says Glick. "In addition, the marketer should understand the importance of networking, and should be able to provide guidance for the individuals in the firm and offer follow up support to their networking efforts. Knowledge of a CRM program or some other devise for tracking leads, referrals, industry data, etc., is also helpful," she says.

Jill Lock, director of marketing at Philadelphia-based Isdaner & Company, has been working in the accounting profession for 19 years, and is on her fourth firm. At all four, she was the first marketing director, and all were regionals of 40 to 70 staffers. Reasons for her hirings have included desire for growth, "direction" to advertising and marketing, and initiatives such as brochures or Web sites. She says partners' expectations for a marketer can include promoting a firm to the media to enhance image and showcase expertise; working on ads, newsletters, brochures, a Web site, and proposals to convey a consistent image; educating staff on how to market; tracking client data; development of seminars; identifying target markets and plans for niche groups; making presentations at conferences; involvement in professional organizations and writing articles for professional publications; and analyzing results of marketing programs.

Telegraphing Value

It's best that marketers report directly to the managing partner, says Sally Glick, marketing officer and director of marketing consulting services at Livingston, N.J.-based Sobel & Co. "The marketer's position and stature in the firm will be more prestigious, and it confirms for the rest of the firm the value placed on this role."

BEGINNING THE SEARCH

Galambos stresses that prior to beginning a search for a marketer, management should choose to what degree the new marketer will be involved in ness development. "Will the mai write proposals? Visit prospects, a networking events, make follo calls for direct mail campaigns, ma the firm's pipeline, set up appointr with prospects for CPAs? Or wil marketer's role be more on the bus development side or the branding supportive side? Both are key roles

Thalia Zetlin, principal/CMO the New York firm Berdon LLP, there are roughly three levels of ma ing professional. "However, the pat the three levels follows a continu she says. "This is particularly true a manager/director level, where indiv als at the one end of the contin might have responsibilities that clo resemble the marketing coo nator, while those with n experience and responsibili might be operating at near CMO level."

- Marketing coordinator: Individuals in this position ex cute programs clearly estab lished and delineated by part ners. Occasionally, the marke ing coordinator assists in deve oping programs when given a specific set of goals.
- Marketing manager/director: This level understands the inner workin and direction of the firm. The M/I uses this understanding to develop programs in tune with firm goals. The degree to which the M/D is involved in initiating, managing, a implementing programs depends o where this person is in the market ing continuum.
- Chief marketing officer: At this sen ior level, the individual has an over all sense and understanding of firm needs and goals and of the market place. The CMO provides strategic input on marketing direction and develops and initiates projects to achieve the firm's objectives. Professionals at this level have expe

rience in implementing most and managing all marketing tasks.

EXPECTATIONS

"Expectations of the marketer should mirror the firm's growth goals, and it's important to outline what's expected as well as how it will be measured," says Glick. The Chicago-based firm Legacy Professionals has a two-person department: a marketing director who joined the firm eight years ago, and a marketing coordinator/assistant to serve the firm's 16 partners, says Robert Tiberi, managing partner.

"When I joined, I was expected to, at minimum, coordinate the various new business development efforts," says Julie Tucek, marketing director. "I was expected to take control of all of the unique and disjointed marketing efforts taking place within the firm and make sure they all fit together with our marketing plan. I was also given the responsibility to create an awareness of marketing among all of the firm's employees." Cristina Hatem, marketing communications director at Syracuse, N.Y.-based TFG CPAs, was hired in 2001 "to increase the firm's visibility and elevate its image," she says. "I wasn't hired in a sales capacity. That's not my area of expertise, and the firm understood this."

She believes, however, that "the partners were uncertain of what to expect. They recognized the need to enhance their image. They were looking to the person they hired to tell them what they could expect. Before I was hired, I told them that I wouldn't increase their sales and revenue, but I would ensure that the movers and shakers and key target audiences for them knew their name. On my first day, I was given copies of anything the firm had done from a marketing perspective prior to my arrival. It was my responsibility to figure out where to go from there. Had I waited for someone to tell me what my responsibilities were, I wouldn't have lasted six months."

'Tactical' Vs. 'Strategic'

Larry Bildstein, president and CEO of The Whetstone Group, Inc., which helps professional service firms develop and implement growth plans, says it's essential to determine what role you're filling: tactical or strategic. "'Tactical' includes tasks such as data management, direct marketing, coordinating seminars, working on proposals, and providing sales support. 'Strategic' leads the effort to define the growth strategy for the firm, and has such tasks as defining target markets and focus services, developing budgets, and allocating resources." You're unlikely to find somebody to fill both roles equally well, he says.

"At first, we thought we needed someone with experience working in a professional services firm," says O'Connell, whose firm hired its marketer last year after looking for someone with at least eight to 10 years' experience marketing for a midsize to large organization. "After interviewing many candidates with a variety of backgrounds, it became clear that industry experience was less important than possessing all the skills and background, but above all commitment to helping us market our vision for the future." MG&Co. screened its top candidates by asking them to prepare a sample marketing plan. He adds that qualifications looked for included an ability to be assertive when needed, "especially given the strong partner personalities in our firm," and "someone who would enthusiastically go out and represent our firm."

"When I started six years ago, they had a director of marketing working three days a week," recalls Karen Love, director of Practice Growth at PKF Texas in Houston. "They knew they wanted something, but didn't know exactly how it worked. They knew when it *didn't* work."

"Our initial effort goes back to the early 1990's," adds Kenneth Guidry, president of PKF, "when we hired a mature, executive-level gentleman who was very connected in the Houston marketplace through political and social relationships, but who wasn't especially effective in helping us build our business relationships. Our next attempt was an in-house marketing person who helped us with collateral (letterhead, brochures, etc.), and not much more. We poorly positioned her internally.

We replaced her with an outsourced solution, a PR firm. The results were marginal at best, since it's difficult to differentiate yourself when the person responsible for helping position you doesn't live and breathe your firm culture.

"Karen's energy level and confidence in her abilities were easily recognizable," recalls Guidry, adding that Love also had long experience with a Dallas firm. "The trick for us was to make sure that we met each other's expectations," he says. "So we had a lengthy interview process where Karen was introduced to all of the firm's owners to make certain that we had a personality and a cultural fit. That's key."

Zetlin adds that expectations change at each level:

- Marketing coordinator: The MC should be able to effectively carry out all assigned tasks. For example, for a newsletter, the writing would be handled by the firm professionals while the MC supervises production and distribution and may edit for grammar and consistency. If the firm has arranged a law firm meet & greet, the MC makes sure the details are attended to and that the event is well organized. The selection of attendees and overall focus and purpose of the event is determined by the firm.
- Marketing manager/director: The firm should expect an M/D to devel-

op most, initiate some, and, with assistance, implement all programs. Using the same examples, an M/D takes a newsletter assignment further and edits the documents from the reader's point of view, identifies target readers, and looks for other ways to use the newsletter. In meet-and-greet situations, the M/D seeks to maximize the outcome by understanding the overall purpose of the event to target attendees, plan follow up, and develop mechanisms to measure success.

- CMO: The CMO leverages marketing experience and a deep understanding of the firm to strategize, devise, and implement programs to meet firm needs. This individual advises on whether a suggested approach makes sense and offers alternatives. You should expect the CMO to efficiently direct a marketing team in fulfilling projects. In considering the newsletter, a CMO identifies other objectives it can fulfill and what other marketing tools should be used in conjunction with it to achieve goals. With a meet & greet, the CMO first evaluates the event in terms of firm goals. If a different approach is required, the CMO will suggest alternatives.

NECESSARY INFRASTRUCTURE

Zetlin also recommends the firm provide the necessary infrastructure for a marketing position to work.

Because an MC is typically a one-person band, she recommends the number of projects be limited based on priorities so the MC can be effective by not being spread too thin.

The M/D will need implementation support, including some combination of the following: writers, designers, database professionals, etc., depending on the firm's marketing emphasis. With a CMO, an infrastructure should already have been created, and all the basic marketing elements established: niche organization; business development training, motivating, and tracking; communications materials; promotions and programs; and database systems should be in place.

Within about a year of hiring a marketing director or manager, a firm will likely need to hire a support person for them, say Nancy Damato and Joseph Tarasco, co-founders of Accountants Advisory Group, adding that a firm can also allocate internal administrative support to help in such tasks as database and list and report maintenance, or mailings. "Once a firm becomes productive with marketing, it will result in a significant amount of administrative work," they warn.

Julie P. Fry, CFO at Dallas-based SalmonBeach & Associates, says her firm hired a full time marketer in the fall of 2002. "At that time, we only had one person handling the marketing area," she says. "Now, we have a director of marketing and a marketing assistant who handles the day-to-day stuff that needs to be handled."

SB's first marketer was unable to work on her own, Fry says. "We really needed an idea person, someone able to come up with a unique approach to marketing for the dull CPA firm. The second person we hired had more experience in our particular field of business and better understood what our firm needed. She is now attending all of our trade shows, and has an uncanny ability to draw the potential client into our booth."

BUDGETS, AND GETTING STARTED

"One of the first things we did was establish a marketing department with a separate departmental budget," O'Connell says. "Linda worked closely with our CFO to identify our level of marketing-related expenditures in prior years, and reviewed MAP surveys to see what comparably-sized firms were spending on marketing." The firm had already established a marketing committee, he adds.

A budget typically comprises three to five percent of the firm's gross revenue, say Damato and Tarasco.

Cowan says his firm established a marketing budget of two percent of annual revenue, and divided the budget into one part for which the marketing director is directly responsible and which includes advertising, promotion, public relations, direct marketing, trade shows, collateral, seminars, market research, training, and internal marketing. The second part includes expenses that she has less control over, such as goodwill, gifts, entertainment and employee welfare and morale.

"We also established specific goals for our marketer that allow her to earn

Identifying the Personality Type

Nancy Damato and Joseph Tarasco, co-founders of Accountants Advisory Group, offer advice for firms' execs looking for the right personality and background in a prospective marketer.

The right personality is dynamic, outgoing, congenial, but not too soft, and unafraid to take risks (within reason) and give professional opinions based on experience. That experience should include a degree in marketing, and experience in accounting firm marketing or a professional service firm. The latter could include law firms, financial services or banking, or engineering or architectural firms.

Marketing directors should also understand the differences between working for a partnership versus a corporation, and that their two primary client bases are the firm's partners and its clients. Marketer prospects often must also be educated on the seasonal restrictions, such as tax time, of marketing an accounting firm.

an annual bonus," Cowan says. "These goals are based on the growth of our firm, offices, and niche areas." When Johnson started, a marketing budget was not in place. "During the first year, that was one of my responsibilities," she says. "Because of the support and buy-in that I had, they understood the importance of the budget and allowed me to create one. Every year now I present a budget, along with our marketing action plan. The partners review and approve the budget. Having this in place makes presenting various different programs throughout the year much easier. I don't have to get everything pre-approved, but we do discuss what I'll be doing and the programs I'm implementing."

She does add that as an intern, she called on an outside consultant. "She supervised my work, similar to what a manager would do. I would report things to her, and she acted as a liaison between me and my partners. Control and oversight were still given to the partners, but it allowed me to present things to them only when necessary, and to work out my questions with the consultant. In training me, she understood that the outcome was for me to become independent and that eventually, she'd be phased out."

Helpful Sites

- Society for Marketing Professional Services (smps.org)
- American Marketing Association (marketingpower.com)
- Association for Accounting Marketing (accountingmarketing.org)

OTHER APPLICATIONS

Marketing has many applications throughout a firm, from providing information on your competitors for retaining clients and cross-selling, to training accountants on how to close a sale, says Lock. Cowan's firm tries to insure that their marketing director is made aware of all new business opportunities before a partner goes on the initial interview. "That way, she can conduct market research on the prospect and their industry, work with the partner on the development of an agenda for the meeting, and insure that the best team is assembled to meet the prospect's needs," he points out.

Fry says SB has always had staff come up with personal marketing plans each year. "This year, we actually went into great detail on the management side as to a marketing plan for each partner and officer of the company," she says. Partners, incidentally, need time to implement their personal marketing plans. Firms cannot expect partners who are working 65 hours a week to be receptive to a marketing director's requests to be involved in the firm's new

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