



Contact:
Pete Pomilio, MBA, Executive Director
Association for Accounting Marketing
Phone: 856-793-0806
Fax: 856-439-0525
E-mail: ppomilio@ahint.com

Developing a Marketing Department: One Mold Doesn't Fit All

Connie Lechleitner, Rea & Associates, Inc.

Whether you are a managing partner, a solo marketer or a firm that is building a marketing department from scratch, creating your marketing team can be a daunting task. And how you shape the department will depend on a number of factors.

We asked three members of the Association for Accounting Marketing - Wade Clark, chief growth officer at Carr, Riggs & Ingram, Nashville, TN; Art Kuesel, director of consulting services at Koltin Consulting Group, Chicago, IL; and Katie Tolin, director of marketing at Rea & Associates, Inc., New Philadelphia, OH, to share the steps they consider crucial when developing a successful marketing department.

Q: What Things Should You Consider When Building Your Department?

Clark: How your marketing department will be structured will depend on the culture of your firm. The culture of firms can be very different. Your marketing department should build on the dynamics that make your firm successful. There is no one structure that is better, but your firm's culture impacts who its marketing team should be and what roles should be included.

Is your firm's culture very conservative, or does it want to be on the bleeding edge? Also, how the firm addresses growth and sales goals, whether the firm already has a marketing plan in place and how the principals are rewarded for sales can also impact what roles will make the best fit for your marketing department.

Kuesel: Not only does your firm's culture define the structure of your marketing department, but so does your overall firm structure. Depending on the competition in a firm's marketplace, its size and whether it is a local, regional or national firm will make a big difference in what that firm's needs will be.

Q: So How Exactly Does Your Firm's Structure Impact the Structure of Your Marketing Department?

Clark: Look at your sales focus. Does your firm organize its sales based on industries, services, or geography? Do you have multiple offices? Defined service lines or industries you specialize in? As you develop positions within the marketing department, make sure that the industries, service lines or geographic areas that are important to your firm are best served.

A crucial element in establishing your marketing department is understanding your executive leadership's strategic plan. Where do they want to take the firm? And know that sometimes, what they say they want might be incompatible with the path they may currently be on.

Another part of the assessment is determining how much the leadership team is willing to invest in the marketing team and its activities. Your accounting marketing department must:

- Increase brand awareness
- Increase the delivery of a positive brand experience
- Assist lead generation
- Assist the sales process

Tolin: Your structure will also depend on the geographic footprint of your firm and the ultimate goals of the department. The department's goals will be a reflection of the expectations of the firm. To take advantage of your culture, you'll also want to match the personality of the department to the personality of your firm, so that your team members will mesh well with your firm's professional staff.

I definitely agree with Wade on needing executive leadership support to build your team – you won't be able to do so without it. It's also important to note that you don't necessarily need a marketer in each geographic area you service. It depends on how far spread out geographically your firm is and what your goals are. In my case, all of our offices are within driving distance, so we are able to service all of our offices from a central location. If that wasn't the case, this model may not work for us.

Certainly if your management team wants employees on the ground in each location, they'll need to allocate the dollars to do so. However, I believe that when you consolidate services in one location, you can save the firm money if your team can still accomplish its goals.

This is also another way culture can play into your structure. If your firm already shares resources openly across offices, your professional staff may be more open to sharing marketing resources as well. If your office locations, or partners for that matter, operate more autonomously, staff members may not be as willing to share marketing resources.

Q: How Do You Know Which Structure is Best?

Kuesel: Most accounting firms across the country use one of three basic structures for their marketing departments. And a few use a combined approach.

- 1) *Generalist.* A generalist marketing department model may work best for a smaller firm, but can become more inefficient as the firm grows. A generalist will typically wear several hats, but will usually become an expert in only one or two of the 20 areas he or she may be performing.
- 2) *Functional.* In a functional model, duties are divided according to function. For example, one person develops all proposals, while another may handle all public relations duties, and another develops the ad layout and design.
- 3) *Geographic.* When an accounting firm has multiple offices over a large area, it may structure the marketing department by region.

- 4) *Hybrid*. Some departments have successfully combined elements of the generalist and functional models.

Clark: I start by building a track. Then I get the engine running. As the structure becomes self-sufficient, you can start to exchange parts, because its function is not dependent on a person – it begins to function regardless of the people in the positions.

Q: Why Would You Choose One Model Over the Other?

Kuesel: A generalist can serve as the single point of contact for the office, which can simplify requests from leaders and therefore be responsive to partners. However, it's my opinion that the generalist model can only take a firm so far, and as it grows, the areas where a generalist has weak skills could hold the firm back. A generalist model tends to be more flexible and can adapt more quickly to different need. The functional model can provide more expertise, but can often be less flexible.

If you look at some of the national firms, they have a national marketing office where they develop the firm's overall strategy, combined with specialists in each office who really understand their market and serve the needs of their office.

Tolin: Let me just add that regardless of your structure, an important part of developing your marketing department is having the tactical strength and skill sets to accomplish your firm's goals. You really need both insight of the firm's strategic plan, whether that comes from your management team or a senior level marketer, as well as specific skill sets in the areas that matter to your firm, such as branding, web development, writing or social media. You might grow these skills from within your firm, or you may need to hire new team members who already have these skills to hit the ground running.

Q: What Does Success Look Like?

Clark: How your firm defines its overall success is a very individual decision. It could be to be the biggest, achieve a certain number ranking, a certain geographic expansion, maximize partner compensation and become a leading top firm in the country for which to work. The important point is to understand the vision of the firm, if it has been articulated – and often it is not.

Kuesel: A firm's marketing department must be able to show return on investment. Measuring return on investment can be tricky, but it can be done. Put the department's work into components that complement the strategic plan of the firm.

Tolin: I agree with Art. The end product you are being asked to produce dictates how your department will be structured and how many people you will need to accomplish it. Every firm is looking for return on its investment, but what that means will vary greatly. For example, in some firms, partners may have great sales skills, while in other firms these skills are weaker and you may need a business developer on staff. In another firm, the marketing department may be expected to produce many proposals, so you need a specialist who can make that happen. Or if a firm produces a dozen different niche newsletters per year, you will need someone to write and design them.

Q: How Do You Know When It's Time to Expand?

Kuesel: If you're constantly feeling under water and overburdened with tasks that are not aligned with your strategic plan, that will be your first sign. If you feel like you are just running from fire to fire, and can barely keep up, it may be time to expand.

Or, perhaps your firm has launched a new niche or is experiencing competitive pressures. Increasing competition or services can be another very good reason to add to your marketing team.

Q: How Does a Marketer Convince Firm Management It's Time to Expand?

Kuesel: Arm yourself with facts such as the marketing department size of your competitors, the marketing budgets of firms your size and geography and the compensation levels of similar firms. The Association for Accounting Marketing can provide you with salary survey and budget information as well as position descriptions. It will also help to have discussions with influential members of your executive team before you actually ask for additional personnel.

Demonstrate the return on investment that additional staff can provide your firm. Show how the addition of staff, especially those who don't need strategic expertise, will free you to provide value-added services that enhance your firm's strategic plan.

Use terms your management can relate to. Explain that work you are currently doing as a marketing director that can be delegated would be equal to a partner doing the work of a staff accountant.

Be prepared to ask, and ask again, and don't be discouraged if you aren't successful the first time you request it. Show the management team the consequences - what items will not be completed if additional team members are not hired. Explain that you will be forced to prioritize the pressing needs of the firm and that only the most valuable ones can be completed.

Tolin: Another way you can sell your team's expansion to executive management might be to compare the costs you may currently be spending outsourcing marketing services. Could you save money if you brought in house, for example, the public relations function, ghost writing, web site updates or graphic design? Do a cost-benefit analysis to determine if it makes more sense to expand your team.

Remember, just like the CPA side of the business, you can grow your staff from within. However you may find you may need to hire someone who is above or below the skill level of your current marketing team to get the specific skill set you need. The bottom line is that the team members must fit your organization, its goals and the skills needed to carry out the tactics you've set.

Q: What About a Firm Looking To Hire Their First Marketer?

Tolin: Remember that the first hire to your marketing department can really be at any level. If your management team has spelled out a strategic plan and is looking for someone to carry it out, you may not need a senior level marketer. It becomes a matter of how hands-on your management team wants

to be. However, if you are looking for someone who will set the strategic direction for the firm's marketing, you'll want a director-level marketer.

When looking at candidates, look beyond the title - all marketers are not created equal. People can share the same title but have entirely different skill sets. I've met marketing directors who have been in our industry for more than 30 years, who are truly experienced senior marketers, and I've also met marketing directors with two to three years of experience after college. While these people share the same title, they would contribute to your firm in very different ways. Look at the product the individual can deliver, rather than the title they hold. AAM's Marketing and Sales Roles and Responsibilities document is a great resource to determine what functions and skill sets you should expect in various roles within your marketing team.

Clark: I find that people tend to either be architects (strategic thinkers) or operational/relational focused, so you need to identify those who best suit the roles you define within the department. You also tend to find people are either branding communication-minded or lean heavily on a business development and sales mindset. That's why there is such a benefit in having a team of multiple people.

Resources

The Association for Accounting Marketers' *Marketing and Sales Roles and Responsibilities*,
http://accountingmarketing.org/Marketing_and_Sales_Roles.asp

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The Association for Accounting Marketing is the only association in the country formed specifically to provide accounting marketers with the tools for professional growth and success. The association's membership of more than 800 members is comprised of marketing professionals, CPAs, consultants, vendors, educators and students who seek to expand the business of public accounting. Since 1989, AAM has provided members with the information, resources and market intelligence needed to excel and grow in their careers. To learn more about AAM, please call 856-793-0806 or visit www.accountingmarketing.org.