



Adding Value



Scott Jensen

Suzanne Lowe

Russ Molinar

Tracy Crevar Warren



Session Objectives

Through *lively discussions* with panelists and your peers, our goals for this session are to:

- *Help you understand* why integrating of sales and marketing is important not only to you but to your firm in the new economy.
- *Provide insight, tools and best practices* to help you get started or strengthen integration in your firm.



Your Hosts



Scott Jensen



Suzanne Lowe



Russ Molinar



Tracy Crevar Warren

The Silo Busters



Where's Your Firm?



Silo City



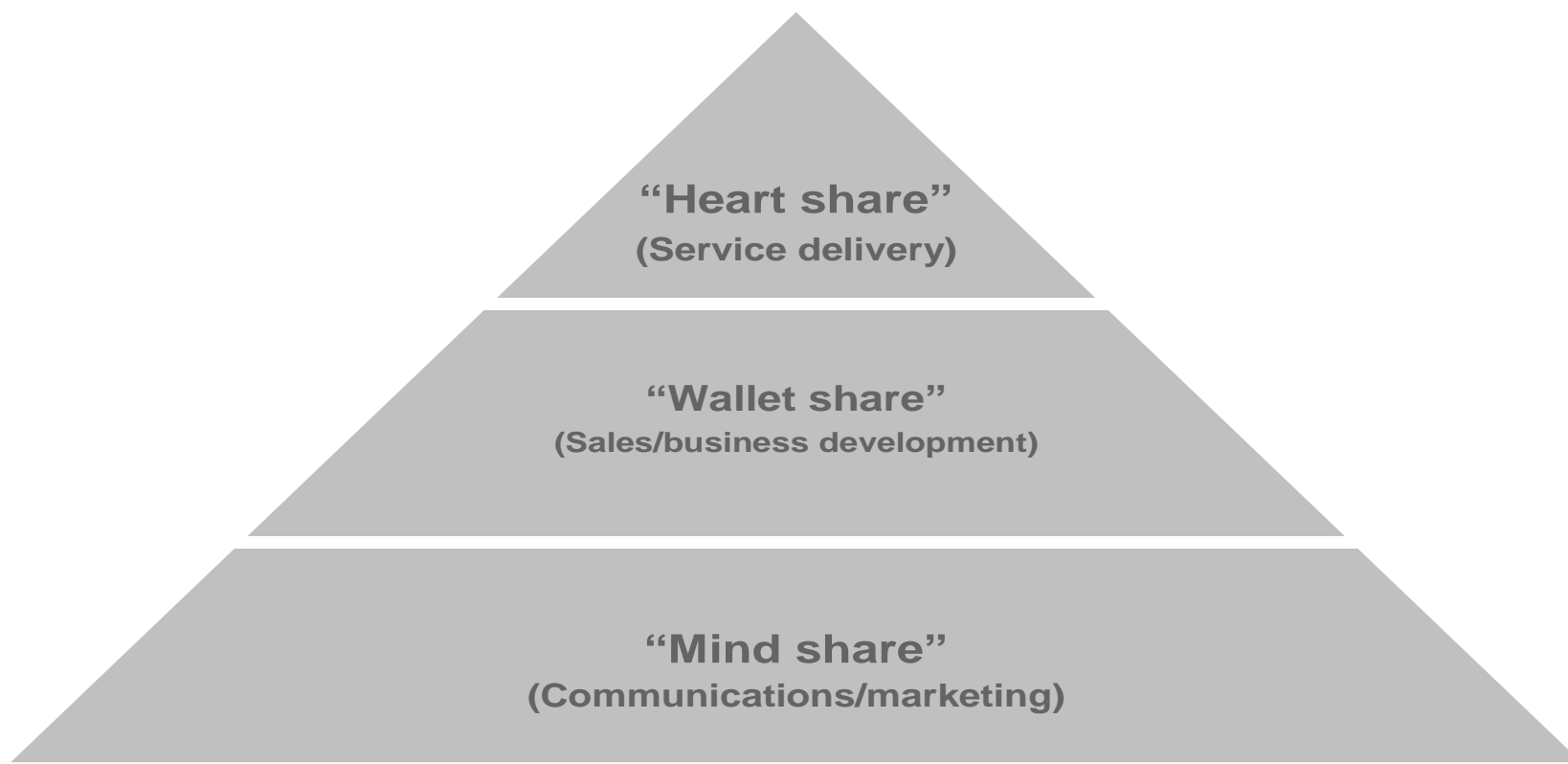
Work in Process



**Silo Free &
Integrated**

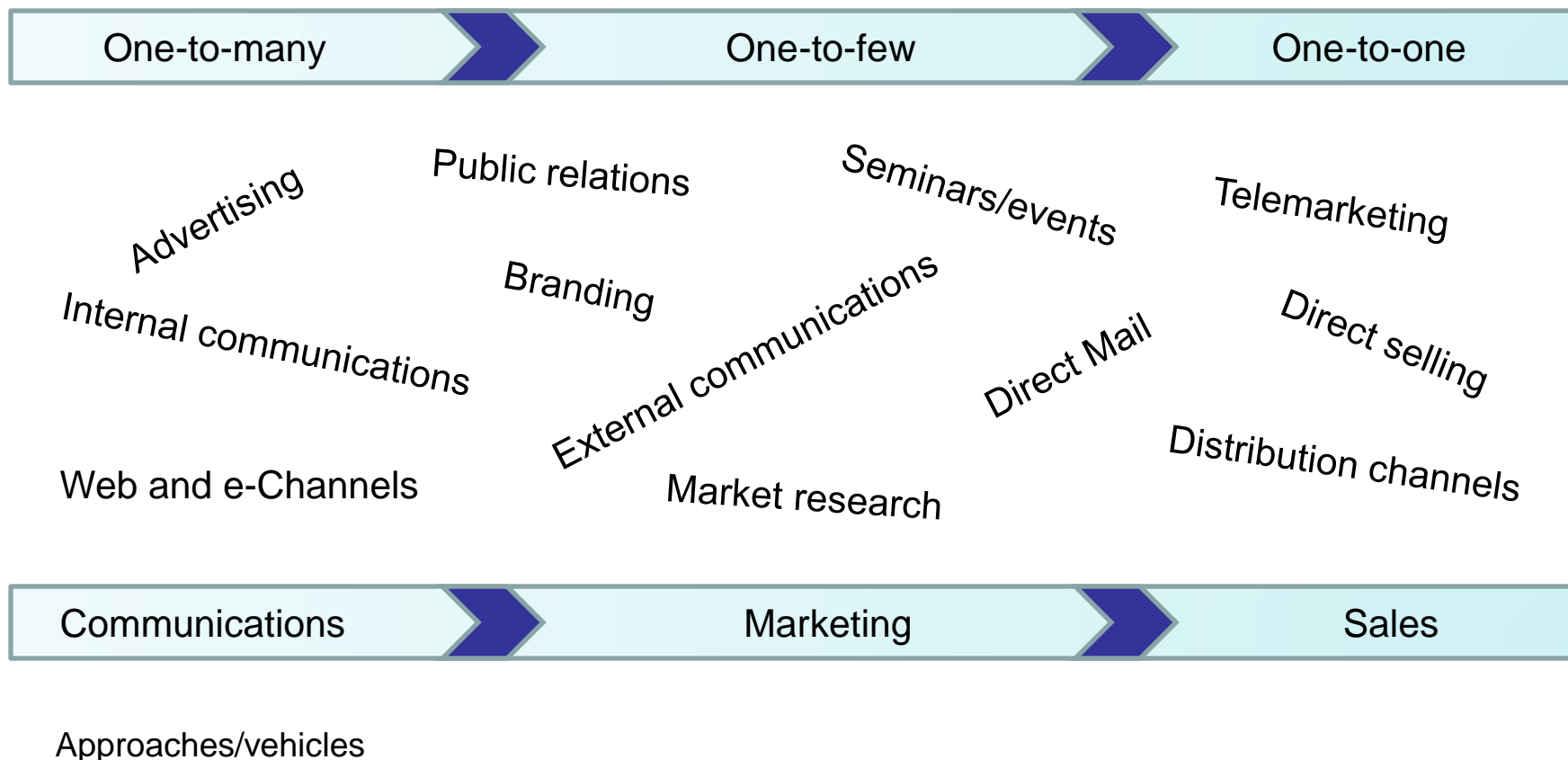


Client Relationship Pyramid





Audiences Messaging





Internal Benefits

of The Integration Imperative

Knocks down silos

Comprehensive

Flexible

Improves innovation

Customizable

Measurable

Demonstrable





External Benefits

of The Integration Imperative

Better understanding
of client needs

Better client value
proposition

Better service delivery



Roles In Integration

- Marketing
 - Design all passive events with measurement in mind
 - Design all active events with planned follow-up
- Sales
 - Drive all follow-up
 - Share and credit marketing with successes (leads, pipeline growth, sales)
 - To marketing – the attitude of gratitude
 - To management
 - Provide feedback and assistance on improvement opportunities for all active events
- Management
 - Provide the tone from the top
 - Fairly allocate resources
 - Communicate success to the firm



Structural Challenges



Process
coordination

Boundary
confusion

Lopsided
marketing
& selling

Underemphasized
skill development



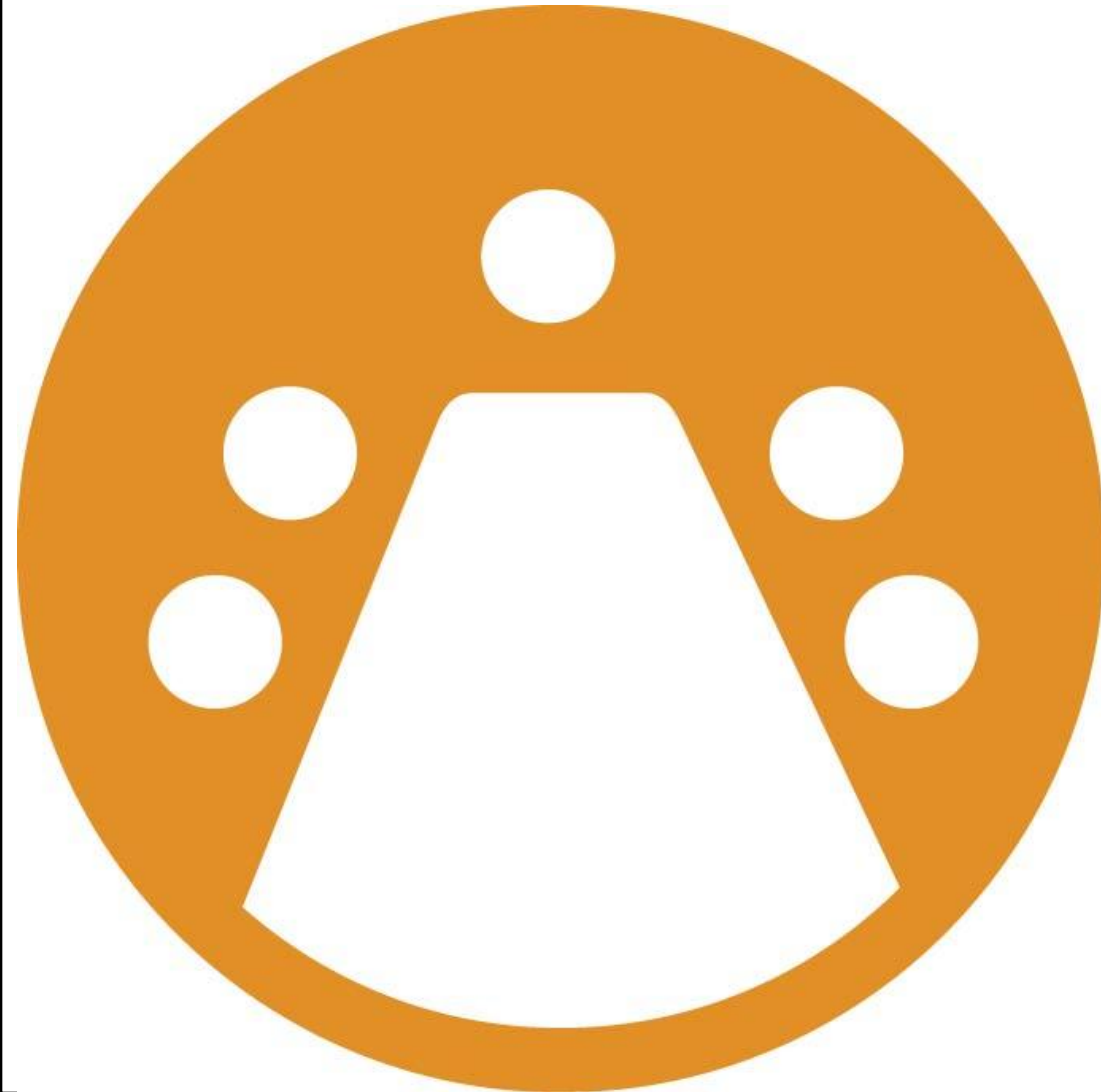
Cultural Challenges

- ◆ Distrust
- ◆ Feeling marginalized
- ◆ Short-term thinking
- ◆ Immature functions
- ◆ Unrealistic expectations
- ◆ Shifting leadership demands





THE 21ST ASSOCIATION FOR ACCOUNTING MARKETING SUMMIT
Building Strong Foundations for Firm Success



Breakout Session



Where's Your Firm?



Silo City



Work in Process



**Silo Free &
Integrated**

The Integration Imperative

The Concept

Integrate marketing and business development into everyone's function at a PSF

Structure

The Process Imperative

The Skills Imperative

The Support Imperative

+

Culture

Articulate the (new) meaning of Marketing and BD for the enterprise

Increase collaboration, shared accountability and co-leadership

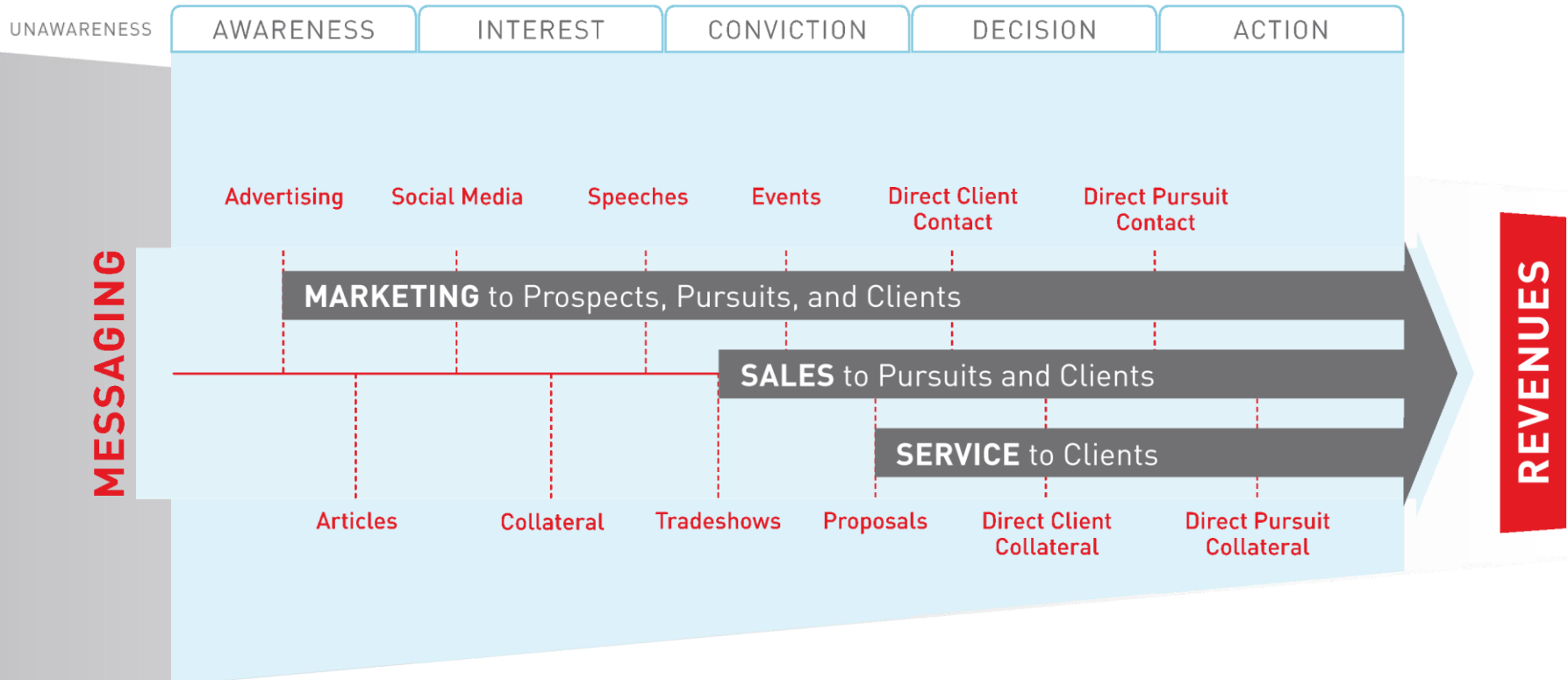
Make expectations more explicit about how everyone can contribute

The Result

PSFs more effectively grow market share, increase the right revenues and provide more value for clients

Business Development

The **Successful Integration** of Marketing, Sales, and Service



PASSIVE

Less Challenging
Less Personal
Less Direct
Less Effective

External People

For the
Service Delivery
Professional

ACTIVE

More Challenging
More Personal
More Direct
More Effective



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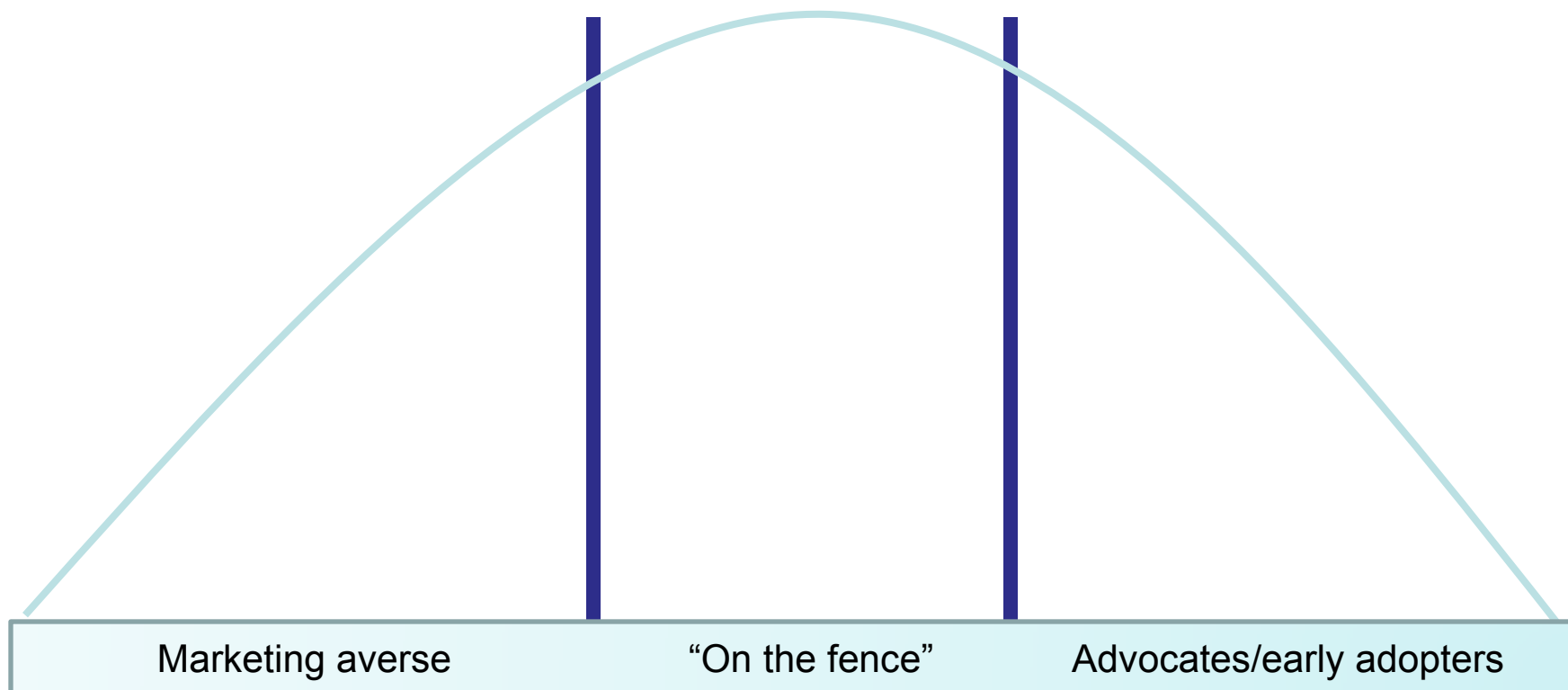


Four M's of Sales Enablement

- **Mobilize** – help your sales force (i.e., partners and staff) focus on business development efforts (e.g., targets, niches, campaigns, products, services, etc.)
- **Munitions** – equip your sales force with the knowledge, skills, tools, training, and resources they need to be successful (e.g., client meeting materials, thought leadership, value propositions, sales process, demo tools, sample talk track/questions, etc.)
- **Motivate** – help your people focus their attention on marketing, sales, and service delivery through individual and institutional efforts (e.g., accountability, carrots and sticks, peer pressure, etc.)
- **Manage** – help manage and guide your sales force for maximum results (e.g., pre-call planning, sales coaching, sales management, monthly pipeline reports, CRM system, etc.)



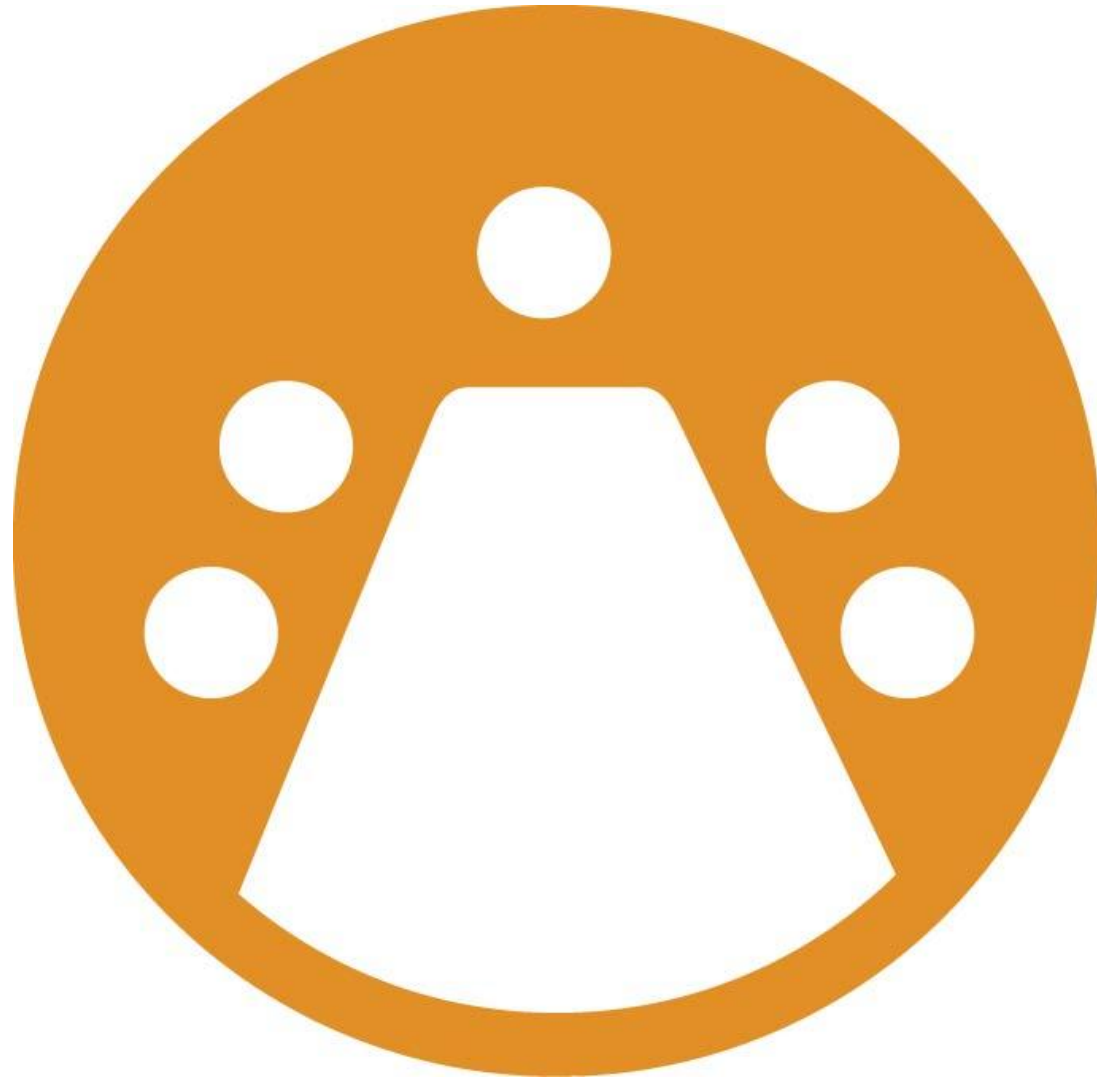
How To Spend Your Time



Typical partner distribution in a professional services firm



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Breakout Session



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Lightning Round



Wrap Up



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Q&A