

## 5 Tips To Ensure the Success of Your Marketing Director

By Dawn Wagenaar  
Principal

Hiring a marketing director is a smart decision. Learning how to work with and support your marketing director is a wise decision. Once the marketing director starts, it doesn't mean your work stops — it just means your work will get easier.

I've seen marketing directors come and go from firms with amazing speed. Having experience myself as a marketing director for a professional services firm, and currently working with marketing directors, I've gathered some tips on how you can get the most out of your marketing efforts while giving support to your marketing director.

### 1. Tools for the Job

Give your marketing director what they need to do the job. This means the proper budget, administrative help, time, tools and patience. Typically firms should budget 1-3% of annual revenue for marketing. The marketing director can only implement the plan if the budget is in place to do so. Keep in mind that marketing is a long-term investment, not a short-term solution. Give the plan time to work — it will.

### 2. Clear Expectations

Nobody can do a good job if they don't know what it is they are supposed to be doing. Define your expectations, clearly state what marketing goals you are trying to achieve and exactly what it is the firm is trying to accomplish. Where do you want your marketing director to start — PR, website updating, niche marketing or client relations? Clarify your focus so your marketing director knows where to begin.

### 3. Easy Access

In order to put together an effective marketing plan, the information used to write it must be accurate. Your marketing director needs access to important firm information such as which clients create the largest revenue stream or what segment of your business had the largest growth in the past year. Data is essential for accuracy. The marketing director should sit in on important meetings where they can get a feel for what is happening in the industry, the firm and with your clients. In order to achieve the greatest ROI from your marketing dollars, access to needed information must be given.

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## I N G E N U I T Y Marketing Group, LLC

*is a marketing and training firm that works primarily with professional service organizations. We offer strategic marketing planning and coaching, marketing program development and curriculum and training mainly in the areas of leadership development, consultative selling, professional service marketing and customer service.*



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#### 4. Proper Reporting

Have your marketing director report to the managing partner of your firm. This will make it easier for everyone involved to get things done. It also helps the other partners know you are committed to the work the marketing director is doing. Be willing to go to bat for your marketing director to get approval on plans and initiatives. Marketing is timely; things need to get done within certain timeframes to be successful. In order for your marketing director to implement a plan, it can't be stuck in a continual loop of negotiation.

#### 5. Solid Support

You hired the most qualified person for the job, so let your marketing director do it. Trust that he or she is working to attain the goals agreed upon and will do it in the most cost-efficient and timely manner. Do your part in helping the marketing plan come to fruition by providing support when needed and being committed to the initiatives. Helping to keep databases current, relaying important information about your referral sources and updating your marketing director on important industry happenings will go a long way toward ensuring success in your marketing efforts.

Hiring a marketing director is an investment in your firm's growth and stability; establishing a good working relationship with him or her is essential to the success of that investment. Once you have built a relationship based on solid communication and trust with your marketing director, relax in the knowledge that the plan is being implemented as it should be — successfully.

good at what you do and then they start connecting. They are the ones who tell prospects “we can do that” even when there is no strong evidence to support it. They are comfortable referring and connecting people.

#### Type 2: Client Service Master / Loyalty

While Client Service Masters do need some information, their main concern is about how making a referral may negatively affect their relationship with the client or friend. They need to know you will treat their people like gold, that you have complete integrity in what you do and that they will get to control the relationship for a while. They will connect and refer people but it takes some real trust-building.

#### Type 3: Technical Expert / Analyst

Although Technical Experts may have concerns about the relationship, their main concern is that they know *a lot* about your service, even the finest detail in the small print at the back. They want to understand every contingency and be completely knowledgeable. They are slow to refer and need a lot of coaxing, but end up being quite loyal in the referrals they make.

If you are creating a training program, rolling out a project or starting up a new service, consider the needs of all your learning types. Add loads of additional information in an appendix so the technical people can read it. Assure the client service people about the importance of their relationships. If you are looking for highly trusted professionals to refer their clients to you, consider their learning and referral styles. Make sure you make them comfortable with the assurances or information they need to move on your behalf. One size does not fit all.

## 3 Types of Learners (and Referral Sources)

By Wendy Nemitz  
Principal

Since we have taught classes at many CPA firms, Dawn and I have discerned that there are three types of learners with different information needs. It dawned on me that these three types of classroom learners also use their learning styles when considering making a referral.

#### Type 1: The Rainmaker / Risk-Taker

Most Rainmakers have a relatively low need for information and a high need for inspiration. They do not need to know everything about your service or product in order to be willing to make a referral. They do not usually need a lot of analytical information to connect the dots. They want to know you are

## Quick Tips on Business Development

Great business development people have persuasive communication skills, the ability to uncover deep hidden needs quickly, create unique selling propositions and drive opportunity development.

85% of great business developers test as “utilitarian” — they want economic reward for their efforts. They are able to fill the pipeline with leads, consistently and efficiently pursue leads, have high win rates based on consistent methods and develop sales knowledge across the firm.

— Anne Stanton, The Norwich Group

## *Gaining and Retaining a Niche Position*

*By Liz Kuntz*  
*Marketing Consultant*

Darryl Cross, director of strategy and competitive intelligence at LexisNexis, made an amusing analogy once between how dogs mark their territory and how some professional service firms mark their territory. His analogy began by explaining he has observed that his dog is (as are most dogs) very territorial. They walk along going about their business, but will stop on a dime, sniff around and decide to designate a plant/fire hydrant/fence with their “mark.” This is their way of signifying to the rest of the world that this particular part of it belongs to them. Then they proudly continue on searching for the next spot to mark as their own.

What Darryl finds funny is that once one dog marks their spot, it’s typical for another dog to mark that same spot — probably encouraged to do so because another dog had been there a short time before.

So which dog does that spot belong to? Neither. That spot will continue to get marked by dogs of all shapes and sizes and they will all think that that spot belongs to them.

Darryl thinks a similar pattern is inherent in professional service firms. For example:

- A manufacturing trade association you belong to has an annual meeting. Your firm hasn’t been great at showing up at other events throughout the year so you gladly write a check for \$10,000 to get a 10-person table and a logo on a program. When no new clients surface as a result of the \$10,000 sponsorship, your firm wonders why and questions the value of being a part of that association.
- A trade publication runs a special report on manufacturing. Your firm is not typically a big spender on advertising, but your firm doesn’t want to be the only one not represented among its competitors. It shells out \$5,000 for a full page color ad. No leads result. Your firm starts wondering if building a manufacturing niche was a poor choice.

By partaking in activities like this you have only gained a moment of ownership. You have failed to protect it. It is no wonder your firm is not being recognized as the industry leader you want it to be.

Dogs will continue to mark each other’s territory, just like professional service firms will inevitably focus on a niche that some of their competitors are also focusing on. Gaining and retaining a niche position isn’t something that happens with a random sponsorship here and a sporadic article there. It’s not enough to just join a trade association or two and show up at their meetings.

Below are suggestions to help you gain and retain your spot as a niche leader.

### **Up the Ante**

If you’re like most professional service firms you probably have joined an association or two as a strategy for growing your niche presence. If you’re lucky, your attorneys and CPAs have actually been attending meetings, writing articles and maybe even participating on committees. That’s great and it’s important that those activities continue.

It’s also important that you provide support unlike any of your competitors to that association and its members.

For instance, consider hosting an invite-only “Lunch and Learn” at your firm for members of one of the associations you belong to. The topic will obviously relate to the association’s industry and will educate them on a subject that highlights your expertise and will help them run their businesses better. Ask the association to co-host it with your firm so you gain the credibility of partnering with the association.

While associations have set events, sponsorships and committees, they will entertain the idea of a creative, value-added opportunity for their members. If they agree to one of your ideas, you will be the only firm among your competitors doing that activity. You will stand out as a result.

### **Give Back**

The more you demonstrate your commitment to an industry the better. You want current and prospective industry-related clients to be clear that you know what you’re talking about and that you’re serious about doing your part to make sure the industry advances.

One way to do this is to administer a survey that will yield helpful information to the members of a particular association. For instance, if you belong to a trade association that is made up of nonprofit executive directors, it might make sense to send out a survey to high net-worth business executives and ask them a series of questions that will yield good feedback on what they look for when choosing where to donate their money. This information will be invaluable to nonprofit executive directors and your firm will be the one to deliver

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it to them. Publish the results and send out a free copy to all industry-related current and potential clients. Include the media on the list. You may get some PR out of your efforts.

Another great way to give back to an industry is by consistently providing valuable information. One of the best ways to do this is by creating a niche-specific newsletter.

### Spend Time with Prospects

Now that you've started to create some name recognition for your firm within an industry, it's time to start spending time with prospects.

It's not enough to small talk with a prospect once a month at an association meeting. You need to start spending quality time with prospects. If manufacturing is a niche you're focused on, invite yourself for a tour of a few job shops. Buy the shop owner lunch afterward and then take him golfing a few months later... and to a baseball game a month after that... and then take him to lunch again.

### Motivate

While these may be great suggestions for initiatives that will help your firm gain or maintain its niche position, they will only be successful if your niche team is motivated to see them through.

An unmotivated niche team is often the reason why niche positions are not maintained. The team needs to be willing to put in the time and effort. Here are some tips to help motivate:

- The team members need to feel like they're a part of a team. Each niche team member should have a task or project they're involved in so they feel like their participation in the niche team is worthwhile. If they don't feel they are worthwhile to the group, they won't be motivated to participate in the niche activities.
- Set up an accountability system. Team members need to know that their participation — or lack of it — will be taken seriously. The best way to hold someone accountable is through compensation. If it's possible to tie someone's compensation to their niche team involvement, do it.
- Consider creating individual marketing plans for each team member. The plan will relate to activities specific to that niche. Everyone enjoys certain tasks over others. People are motivated to do the things they enjoy. Creating these individual plans will engage people in the activities they enjoy and will therefore get done.

- Set aside a time each month for the niche team to get together and discuss the team initiatives. Consider having the meeting from 10:00-11:00 a.m. and then requiring each team member to go out to lunch with a prospect afterwards (something they would need to preschedule).
- Share success stories. People are motivated by success. Put niche team updates in the internal firm newsletter or post successes on the lunch-room bulletin board. Others in the firm will comment on the stories, and the niche team will want to keep engaging in activities that will continue the buzz.

### Focus

Slow and steady will win the race. Another surefire way to overwhelm your niche team is by asking them to take on too many initiatives at once. Spreading your team — and your resources — too thin will have zero impact on creating a name for yourself within an industry.

It's best to focus your efforts on a few (one to three) initiatives each year, per niche, depending on the size of the initiatives. Focusing on fewer activities that are more focused will yield higher ROI.

Each year a marketing plan should be created for the niche that outlines its initiatives for the coming year. If opportunities or ideas arise throughout the year that don't fall in line with the marketing plan, simply put them in a folder to revisit when it comes time to do next year's niche marketing plan.

As the old saying goes, "It's a dog eat dog world." If you're serious about wanting to gain and retain your niche position you need to be willing to fight for it. Being consistently motivated, focused and innovative year after year is what will help you hold your position as a top contender in the fight.

## Get a Clue

At the October 25 Upsize Business Builders Awards & Seminar, one of the panelists for the Best Practices in the People & Workplace session made a bold statement:

*"Culture eats strategy for lunch every day."*

In the accounting world, this couldn't be more true. Recruitment and retention is a top concern among accounting firms. In fact, according to the AICPA's Management of Accounting Practices (MAP) 2007 survey, it was the number one concern of survey participants.\*

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Culture is key to recruitment and retention. Unfortunately, firm leadership may not have a clue about their true culture.

The best way to find out is to ask. Ask the people who work there. Ask the new people why they chose to work at your firm. Ask the people who have been around why they stay around. Ask what could be done to ensure they stay longer.

Want to really know what your team thinks? Have a third party ask. The staff will be more open and honest if they're talking to someone who does not have a direct connection to their job security.

If you're looking for a third party to solicit this feedback, Ingenuity Marketing Group would be happy to help you get a clue about your culture. Contact Liz Kuntz at [liz@ingenuitymarketing.com](mailto:liz@ingenuitymarketing.com).

*\*The survey had 1,663 respondents, 113 of which were from firms with 21 or more CPAs. The results in this article were based on the answers of respondents from those firms.*



**Into the Wild**  
Amy and her husband, Corky, on a recent camping trip.

## Introducing Amy Newton

We are excited to announce the addition of Amy Newton, Liz's older sister, to Team Ingenuity!

Amy Newton is not afraid to dig into clay, pick up a paintbrush, string a bead or arrange the perfect floral bouquet. Admitting to channeling Martha Stewart on occasion, Amy is all things aesthetic. Her appreciation for art and design coupled with her marketing background gives her a "big picture" view of a client's needs.

As a marketing consultant, Amy offers:

**Optimal Organization.** Amy could manage a project in her sleep. The consummate multitasker, she is not one to sit still. Recently married, Amy may be the only bride on record that thought planning a wedding was "easy."

**Happy Harmonizer.** You can't pick a fight with Amy, she is not a fighter. She is all things Libra — very balanced and able to see both sides of any situation. Amy will work to keep your project flowing smoothly, keeping everything in perspective.

**Creative Excellence.** Amy is always experimenting with new ways to satisfy her need to create. She has taken classes in everything from graphic design to knitting and views painting her house as an annual "must do" on her list. Amy's constant creativity manifests itself on a daily basis and wows our clients.

Amy holds a Bachelor of Arts degree in Business Management from the College of St. Benedict. She has garnered knowledge from her previous positions as a business analyst with Target Corporation and as a marketing communications specialist with Streeter and Associates. Amy recently traveled to the Netherlands and Costa Rica and looks forward to discovering the beauty in other destinations in the future.

**Jungle Fever**  
Amy, Liz and Corky on a rainforest hike in Costa Rica.

