



Firms Employ Marketing Directors, Internal Programs For Soft Skills Training



Accountants need soft skills training in order to succeed at practice development

By Lisa A. Rozycki

When you look at staff training schedules for most CPA firms, even state CPA society curriculum hitting members' mailboxes, you'll see plenty of technical courses on tax return preparation, basic A & A, business valuations, and fraud. What is sorely missing in some of them, and sparse in others, is the "soft skills" component that accountants need in order to succeed at practice development.

Smart firms are employing their marketing directors to make up for the lack of soft skills training that is being offered in CPE curriculum by asking them to either provide the training or work with other members of the firm to develop programs involving internal and/or outside experts.

Many marketing directors are often asked to provide training to staff on marketing and communications related topics when they join a firm. For new marketing directors, it can be an effective way to begin building credibility and a marketing culture. Seasoned marketing directors have used training to communicate everything from business development and new corporate identity standards to the proper way to act at a tradeshow booth.

"I have worked in the accounting marketing industry for eighteen years and have tried to incorporate marketing training into continuing education for CPAs in every firm I have been associated with," says Jill Lock, Director of Marketing, Isdamer & Company, LLC, Bala Cynwyd, Pa.

"I think it has helped me in that it positions me as an expert," says Lock. "It also helps me gauge how people feel about a particular marketing activity. If I deem it as important, yet the staff feels uncomfortable with it, that's something that should be addressed with more communication and training."

Many marketers are bringing in outside experts to conduct ongoing training programs for their firms instead of one time training sessions done periodically throughout the course of a year.

Melissa Farmer, Marketing Manager, Somerset CPAs, P.C., Indianapolis, In. says her firm has gotten serious about marketing training over the last few years. Last summer the firm held a six-session program where Farmer worked with a consultant who provided the materials and "train the trainer" sessions in order to conduct the program.

"We also worked with our local Toastmaster organization and held their Speechcrafter® program here in our office," says Farmer. "This let us provide a safe and friendly environment for our associates to work through any anxieties they may have had about public speaking."

Somerset CPAs, P.C. has also realized the importance of making sure a supervisor in their Health Care Group knows the services that a manager in their Manufacturing and Distribution Group provides and to what type of clients, for example.

"They can't recognize opportunities unless they know the entire scope of what our firm does," says Farmer. "We hold lunch and dinner sessions for each industry and service group to discuss what they do and what types of clients they are looking for. A few years ago, we even held an internal tradeshow for that same reason."

Cowan, Guteski & Co., P.A., of Toms River, N.J. recently conducted a twelve-month professional development program called "Best Year Ever Professional Development Program."

"Instead of spending a lot of time and money on advertising this year, I wanted to work on getting people involved in the business development cycle," says Eileen P. Monesson, Director of Marketing.

The program involves bringing in a consultant for twelve months of on-site training focused on the core elements of business development skills in the areas of sales, targeted personal referrals, presentation skills, relationship building and belief systems. Each three and a half hour monthly session includes follow up coaching and a quarterly analysis of each participant's progress to evaluate the effectiveness of training and how the participants are implementing the strategies learned.

Monesson says it's had a huge impact on the firm's marketing culture. As a result she has more ambassadors out there developing referral relationships and selling the firm's services. It has also eased the burden of Monesson trying to constantly push business development onto the firm's professionals.

"The outside consultant has validated everything I have been telling them," she says.

Cowan, Guteski & Co. has also developed a young professionals group, which includes around fifteen of the firm's professionals. The participants are under the age of thirty-five and under the manager staff level. Internally, they get together to discuss new business development techniques. Externally, they reach out to other professional service firms through networking events.

"We are going to encourage them to meet on a monthly basis," says Monesson. "The whole point is to have them out there developing networking skills. When they get older and move up the ladder to manager or partner, hopefully they will have developed the communication skills needed in order to be successful."

Universities Thrive

The Washington state-based firm, LeMaster & Daniels, created L & D University in 1996. The CPE program is modeled after a college type curriculum with courses running from May through November of each year. The curriculum includes technical, as well as, soft skills training and a leadership tract. The sessions are usually held at hotels to accommodate the speakers and staff members who are coming from twelve different offices throughout Washington and Idaho.

A CPE committee meets about four times prior to the start of a new calendar year to plan the curriculum based on feedback from prior training evaluation forms and the executive committee. Curriculum also changes from year to year depending on the strategic goals of the organization.

During CPE week, which is held the first week after the holidays in January, web meetings and videoconferences are held to explain the curriculum for the year. All of the courses are also posted on the firm's Intranet.

During that week, the staff is required to go online and register. All registrants need approval of their courses by their office COO. In some instances, the COO takes the initiative to enroll people from their office for marketing courses depending on their job function and staff level.

"We've done an analysis on the cost and it certainly is more cost effective for us in most cases," says Alice Hardin Director of Human Resources for LeMaster & Daniels. "The other thing I think it provides is that it brings our people together that are in either like service areas or staff levels. You get a firm sense of camaraderie that develops."

A component of L & D University is a leadership-training program that is offered for managers and above who have to go through an application and interview process to be accepted into the program. While the firm does use internal resources as much as possible for speakers, they do bring in external speakers for the leadership training program and attend outside courses as well. Hardin says the firm cannot provide it all, especially for professionals who have specialties.

"We continue to receive positive feedback on that," says Hardin. "Certainly, external leadership programs are very valuable but we have found that by doing it internally, the participants hear directly from the senior management team and they are able to be assigned projects within our firm that further the effort."

Hardin notes that with an outside class, it is very challenging for professionals to come back and try to convey what they've learned. She says it is very difficult to capture that knowledge and enthusiasm.

Pannell Kerr Forster of Texas (PKF Texas), Houston, has been offering PKF University since 2000. The firm offers courses throughout the year on technical issues as well as soft skills programs such as: "Ten Pet Peeves of Entrepreneurs"; "Got Humor?" and "Writing to Your Audience."

Courses are offered twice a month during the entire year. As speakers, PKF brings in University of Houston professors, Texas or Houston CPA Society members, internal members that are specialists in their niche area, and outside consultants in general.

The curriculum is steered by three taskforces: 1) PKF University- a taskforce that runs PKF University and brainstorms ideas on topics; 2) Eye on the Marketplace- a taskforce that listens to team members and are active and integral to what is going on in the marketplace; and 3) Leading Edge magazine- a collaboration of Leading Edge partners that brainstorm on article ideas.

The firm's Recruiting & Retention Manager and Manager of Practice Growth and Marketing also sit on the taskforces.

Karen Love, Director of Practice Growth for PKF says that the PKF University allows everyone to feel that they are moving in the same direction. "We use it to inform our members about our strategic plan," says Love. "We use it as message central," she says.

A good example of that is what the firm did when the Enron crisis broke out in Houston. "We did something on Ethics and our President gave our team members a pep talk as a reminder that we are an upstanding firm," says Love.

As for marketing and practice development, Love notes that PKF University gives her marketing staff the pride in knowing that they have a marketing team and a firm culture that work together. "It helps our professionals to recognize us as not just administrative staff," she says.

Lock, of Isdamer & Company, LLC, sums up the feelings of all of these firms with regards to soft skills training. "We view training as a building block to actually going out in the field and trying new things. You have to continually provide training so that marketing and business development stays in front of them," says Lock.

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