



Marketing Directors Prepare to Lead

Strategic thinking, partner support, curiosity and staff development are keys to accounting marketers' success



By Lisa A. Rozycki

Successful marketers who have made partnership and those in chief marketing positions know that there are several common elements to commanding a seat at the table, even making partnership—think like a strategist, have a never-ending curiosity to learn including reaching out to other industries to get a broader perspective, and develop your staff with the goal of creating ambassadors for your firm.

“Demand a seat at the table,” says **Brett Flickinger, a partner with Dugan and Lopatka CPAs** based in Wheaton, Illinois. “I didn’t demand a partner position from the start but I did want a seat at the table with the partners because marketing becomes a part of most firm discussions.”

Flickinger started out in the accounting industry at Grant Thornton as a consultant in their international practice, moved into a marketing director position at GT, left to join a public company, and then eventually interviewed for the marketing director position at Dugan & Lopatka in order to move back to the Chicago area.

Flickinger advanced through the interview process with Dugan and Lopatka. He was able to convince the partners that a marketing director who had a seat at the table would hold the partners accountable. Within a couple of months after landing the job, he was able to process some low hanging fruit which got the partners on board with marketing very quickly. He became a partner three years ago.

“I think differently,” says Flickinger. “They like my perspective on even the common issues facing the firm. I am at the table and am able to contribute to the firm beyond marketing and business development.”

“One of the things you have to do in gaining credibility is offer your partners something that makes their job easier,” says **Karen Love, the Director of Practice Growth** and a marketer who became a partner at **PKF Texas based in Houston**. “If you are a well rounded person who understands the marketplace, you are going to be successful.”

Love’s career has included stints in the fashion merchandising and staffing industries and she says those skills have been very transferable to the accounting industry. All of those things, she says, helped prepare her to have a strategic vision. “People saw the skill set in me and were able to position me for success,” she says.

Love’s advice to marketers moving up the ladder is to get out of thinking that you have to know everything. “Surround yourself with talented people and don’t be intimidated by that,” she says. “More than likely a marketer is coming in from the tactical side when they should be delegating that to their staff so that they can be more of a strategist.”

Love came to PKF Texas knowing that she wanted to concentrate on business development. “I knew what the marketplace needed and what my firm could provide. I needed a super talented marketer to help me get there.”

Now Love's talented marketers include a marketing director, administrative assistant, and a public relations associate. She also turns to an executive coach when she gets bogged down with a problem that she needs help working through.

"Leverage yourself," says Flickinger. "When I was at Grant Thornton, I had a staff of four. When I came here I was by myself."

Flickinger says a key component in being successful is to be able to work with administrative staff and have partners take on more responsibility.

Flickinger's suggestion to young marketing directors moving up the ladder is to start with the firm's champions. Marketing directors need to be proactive and find out how they can help their partners.

"Win them over one by one," he says. "Many of them are 'show me' type people."

"I am very fortunate with my partner group," says Flickinger. "They appreciate and understand marketing. You have to get to a size firm that can do that. My firm is probably one of the smallest that has a marketing partner because they have vision."

Another key ingredient in success is a never-ending curiosity to learn—not just qualitative learning but quantitative learning as well.

"It is one thing to say you know what a 1040 is but you really need to know what information is needed to fill that out," says Flickinger. "That helps you communicate with your partner group," he says.

The other thing Flickinger says is important is to be able to track and manage programs and the success they bring to the firm. Bottom line and top line revenue have to do with a "work with" style, he says. If a partner is not comfortable speaking publicly than marketing directors shouldn't try to force them to do so. Marketing directors need to work with partners to make them more successful, he advises.

Leslie Guelcher, Marketing and Technology Director for K2S, PC based in Erie, Pennsylvania grew up hearing accounting terminology because her father is an accountant. She says it has helped her greatly in communicating with her partners.

Guelcher's advice to young marketers is to be exposed to a variety of educational opportunities and read every accounting and business publication they can get their hands on. "Knowing the accounting business really well is very important," she says.

Tammy J. Allen is Vice President of Marketing and Communications for Allen, Gibbs & Houlik, L.C. in Wichita, Kansas. Allen is a newcomer to the accounting industry but brings a wealth of marketing experience from a marketing career in higher education for a state university. Prior to that she gained experience in professional services marketing for an advertising agency.

Gaining experience in other industries and earning an MBA has helped Allen see things from a broader perspective. "The more experiences you have in putting yourself in your target audiences mindset, looking at solutions to their problems, and enhancing their wealth, the more successful you will be," she says. "You learn the tactical stuff along the way. You have to think about it from the standpoint of 'why should I care?'"

For her professional development, Allen wants to stay current with the marketing profession as a whole and not just within the professional services arena. She looks to a number of places including AAM, the AMA and the Public Relations Society of America.

Allen is always hungry for information. She does a lot of on-line research to get background information on what she is working on. She also reads several publications on an ongoing basis for understanding industry and business trends including the *Wall Street Journal*, *Working Knowledge*—Harvard Business School's Business Newsletter, and the Society for Human Resource Management's (SHRM) e-mail newsletter. She also reads several other business publications.

Guelcher has been very active with the International Association of Business communicators (IABC) and sits on one of the association's regional boards. She attends their annual North America conference, usually held in either the U.S. or Canada, which draws more than a thousand people from all over the world. She also attends AAM's annual conference once every few years.

"I get a broader idea of marketing and what is cutting edge in other fields," Guelcher says. I come back and apply that to what we are doing at our firm."

"It's actually built my confidence a lot," says Guelcher. "I've been able to widen my skill set. Being active with IABC and AAM has been a huge advantage for me. Being able to see what works and what doesn't and not having to go through trial and error here. It builds my credibility."

Flickinger turns to the Association for Accounting Marketing's (AAM) annual conference for professional development courses and to network with his peers in the accounting marketing industry. He has also formed a small e-mail discussion group with marketing peers across the United States that he can bounce ideas off of.

On occasion, he will attend American Marketing Association (AMA) and American Institute of Certified Public Accountants (AICPA) sponsored seminars in the Chicago area. He is also a big reader. He pulls ideas from books and tries to apply them to the accounting industry.

Both Allen and Love try to develop their staff with the goal of creating ambassadors for their firms. They also look at each person's skill set and what needs improvement.

Allen has two fulltime staff people that work for her and she shares an administrative assistant. In any new position that she has had, she assesses the capabilities of her staff and what the mission of the department is in developing her staff professionally. She also sees how the skills they have fit in with the goals of the firm for practice management.

"I ask questions like 'What is the next step for you?', 'What would make you more marketable because the odds are they won't stay with our firm for the rest of their lives,'" she says. "We want to look at that."

Allen finds opportunities for staff to engage in work that they are interested in and want to get better at. She tries to find ways for her staff to gain more exposure to marketing by interacting more with those in the marketing industry with more experience. For example, she took her Marketing Associate to meet a graphic designer, one on one, since she handles the firm's graphic design projects but does not have an art degree. Allen also took her to a printing press check and a brown-bag marketing workshop not necessarily geared towards professional development. She also encourages staff to get involved in local community organizations.

When looking for training opportunities for staff, Love puts them through web site management training, time management, risk management sessions to make sure they don't put the wrong things in their marketing materials, presentation training, and personal goal setting workshops. She also takes staff to different events and meetings.

"Whatever skill set they need to have developed, and they don't have an aversion to it, I want them involved in it," says Love.

Lisa is the founder and Principal of LR Marketing Group, a marketing consulting practice specializing in growing revenue of professional service firms through market analysis, planning and implementation, public relations, lead generation, and business development. Lisa has 24 years of marketing experience including 8 years as a marketing director in the public accounting industry. She can be reached at 1-610-582-0097 or lisa@lrmarketinggroup.com.

www.lrmarketinggroup.com