



Beating the Longevity Odds: Career Paths of 3 Marketers

Jean Marie Caragher, *Capstone Marketing*

In January 1990, I started my second job as a CPA firm marketing director, moving from Long Island, N.Y., to Atlanta, Ga. When I entered my new office there was an article waiting for me on my desk with the headline, "Average Tenure of CPA Firm Marketing Directors is 11 Months." I asked myself, *What have I done?*

Fortunately, the accounting marketing profession has come a long way since 1990. Marketing director tenure has increased dramatically. Marketers are achieving partner, principal and chief marketing officer status. So, with these advances have partner expectations of their in-house marketers changed?

To answer this question I interviewed the managing partners of three firms with long-term marketing professionals: Julie Barnes, Marketing Director, Smith & Howard (Atlanta, Ga., 10 partners, nearly 100 staff, 1 office), has been with her firm for more than 20 years. Ann Callister, Director of Marketing, Clark Nuber PS (Seattle, Wash., 19 partners, 180 staff, 1 office), joined her firm more than 17 years ago. Fonda Lang, Practice Development Manager, Keiter (Richmond, Va., 17 partners, 134 staff, 1 office), has been with her firm for more than 13 years.

The Beginning of Their CPA Firm Marketing Career

Each came to the accounting marketing profession from a different place. Barnes joined Smith & Howard in late 1993 as an administrative assistant to the firm's then managing partner, Jim Howard, and the audit department. "The audit practice drove the business development and marketing," explains John Lucht, CPA, Managing Partner of Smith &

Howard. "Julie was involved in the marketing of the audit practice. She expressed an interest to grow in her career and do marketing."

Callister joined Clark Nuber after 10 years in bank marketing, which gave her the experience of finding the right target audiences and clearly communicating with them based on their needs. "When Ann was hired at Clark Nuber, there was a clear misunderstanding of what a marketing director would do," explains Dave Katri, CPA, Senior Advisor, who recently retired from the CEO role at Clark Nuber after 14 years. "The role clarification between marketing and sales happened fairly fast. Ann began to implement marketing programs to help drive sales, but she wasn't going to be the business development person. The separation of sales and marketing early on helped to set the right framework for her to be able to implement the right type of marketing programs."

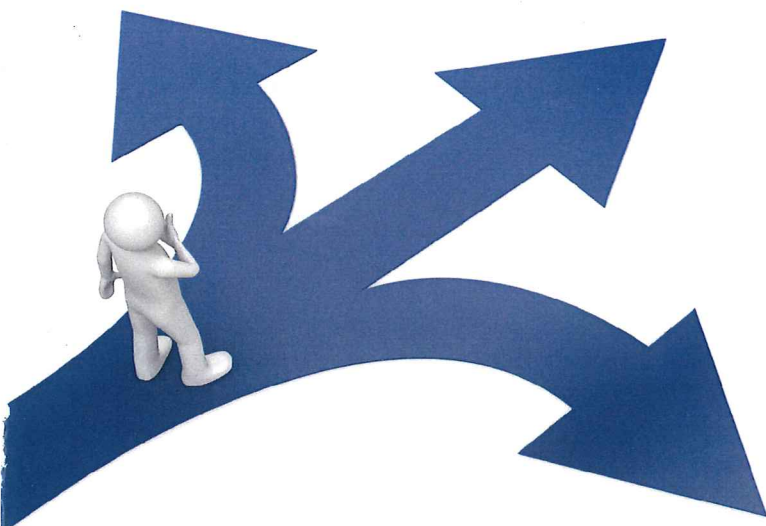
Lang spent three years at McGladrey prior to joining Keiter. She understood the CPA firm culture, how a firm operates, and the importance of getting to know the partner personalities and gaining their trust. She was hired as a proposal writer and to clean up the proposal process. "She wasn't willing just to be a proposal writer," says L. Michael Gracik, Jr., CPA, Managing Partner of Keiter. "She is a marketing professional and was able to help us manage the marketing process better. Before Fonda arrived, our marketing efforts were haphazard with everyone doing their own thing. Fonda helped us be more strategic about our marketing plan."

Partner Expectations

Partners have always set high expectations for Barnes. "The longer you work with Julie the more you get that trust feeling," Lucht says. The expectations each year get higher based upon her experience and what she's delivered."

The biggest thing that's changed over the years is social media and information overload, according to Lucht. "We have more information at our fingertips. We also have the same expectation of Julie," he says. "If we have a question she should be able to get the answer quicker. Think smarter, faster, better. We expect her to step up her game and get information."

With so much information available, Lucht now looks to Barnes to hire the right people to get the answers. "In the old days we'd say, 'Julie, go do our social media marketing plan.' Now, we don't expect her to do it but to manage the wisdom."



Meanwhile, Callister spends a lot of time with the principal group, helping them with industry niches and individual sales activities to get them across the finish line. "Then, as partners, they understand the importance of marketing. It's not a surprise about what she does because they have received Ann's care and guidance," Katri says.

The Changing Marketer's Role

The firm's marketing is changing to counter competition, according to Gracik. A couple of years ago, Lang suggested hiring a public relations firm to place articles and news about the firm. "We were confident in Fonda's ideas and if she thought we should do it then we should do it, and it has paid off big dividends for the firm," Gracik said. "If she had asked us to do that 10 years ago, we would have told her that she was crazy."

Lang also suggested the rebranding of the firm, which has had a positive impact on the firm's culture. Keiter's brand strategy impacts what they call "lift outs," attracting experienced professionals from Big 4 or regional firms to fill a specialty niche or bring a client base with them. "This is one of the ways, in addition to organic growth, of successfully growing our firm," explains Gracik. "We can't attract those people unless our marketing folks have created a strong brand in the marketplace. These experienced professionals want to go to a firm with their act together from a marketing standpoint to help them succeed."

Expectations of Callister have changed dramatically from early on, as well. Clark Nuber has migrated from a general purpose firm to industry niches and service line specializations, and, with that, there is a lot more input coming from partners about the strategies in these groups, Katri explains. "First, the partners need to get their act together about the priorities for the firm at large — what are the most important things? Then, we need to make sure that the right levels of support are delivered by the marketing department to implement the strategies of the market niches. Ann has a great deal of interaction with these groups. She understands the strategies and develops tactical plans to raise the awareness of our firm and make our people successful."

Gaining Partner Respect

Callister receives many requests for support and resources, some that don't fit the strategy of the firm, according to Rob Wheeler, CPA, President/CEO, Clark Nuber. "She advises them on what needs to happen in order to earn additional support or resources from marketing. She's strategic about spending money on items with marketing and branding benefits, and is intuitive in how she interacts with people," he says.

"Ann has driven many new initiatives for the firm," Wheeler continues. "She finds ways to demonstrate immediate success, which she communicates firmwide. That helps her gain support for other new initiatives."

It helps that she is practical with the firm's marketing budget. "You can throw all sorts of money at technology that may have moderate return on investment," says Wheeler. "She identifies what makes sense for us."

The Evaluation Process of Evaluating In-house Marketers

Lang is evaluated in the same way as all staff below partner on five core competencies: productivity; technical knowledge and work quality; client service; people development and teamwork; and business development. She is also evaluated on the results of the firm's electronic marketing, public relations, and how well she supports the partners and staff with their marketing efforts. "The marketing plan is used for her annual goal setting, which is a collaborative effort with Fonda," Gracik says. "We determine the goals that will help us achieve our strategic plan; a big part of her evaluation is how well these goals are achieved."

Smith & Howard uses the Rockefeller Habits approach to strategic planning and goal setting. The firm had a strategic planning session last year, where the partners put together a five-year vision, broken down into one-year goals, and 90-day goals to get the one-year goals done. "We try to drill it down as much as possible to keep it within those goals so we don't go off task," Lucht says. "Julie's BHAG (Big Hairy Audacious Goal) this year is the digital marketing strategy. The other stuff is to improve the overall effectiveness of her staff, help her staff to be quicker and faster on a daily basis, and stay focused on her top priorities."

Barnes takes part in the firm's biennial Career Development Meeting process. She also meets weekly with Lucht and monthly with a Marketing Committee.

Callister has a formal annual review with the firm's managing partner. Input is sought from her marketing team and others in the firm. About eight or nine years ago, she developed a three- to five-year roadmap for the marketing function that lists the critical elements that she thinks are important for the firm to get done, and she uses this for her annual goal setting, according to Katri. "She sets a vision for the marketing function that aligns well with the firm's marketing and business development goals," he says.

Aligning Marketing with Firm Strategy

Lang helps the firm with its strategic plan, Gracik says. "Our strategic plan is always about growth and business development. Fonda and her marketing team know the ins and outs of our strategic plan and design their efforts to help us achieve that plan."

Katri believes that having tight alignment of the firm's support functions with the business strategy is critical to success. "When you don't have alignment and connection with strategy, the support groups make up what they'd like to do. 'What projects do I think are interesting?' When you have a disconnect with strategy you're going to have projects

come out that you introduce back to the professionals in the organization, and they will think, 'Why did we do this?' The alignment and sticking to the marketing plan that mirrors the strategy of the firm is when you can point to how you're driving the firm forward. Marketing plays a key role in doing that."

Advice for Managing Partners


What advice do our managing partners have for their fellow managing partners about building a successful marketing function?

"Get out of the way," says Gracik. "Embrace their ideas. Let them be part of the strategic planning process. Give them some room to take risks and be creative for the firm."

Start with someone who knows the firm and/or the partners already, Lucht advises. "It has to be the right person. Be consistent with how you supervise and keep the pulse of the person on a regular basis. Be firm and have the tough conversations," he says.

Katri advises providing support around the marketing person: "Protect them, especially for the first year or two, to allow time for the marketer to start broad-based programs." Wheeler adds, "All partners need to know that the managing partner has the marketer's back and is willing to support them. Give

them autonomy to make decisions on strategy and resources, and not have to respond to every partner whim."

When Barnes, Callister and Lang started with their firms, the firm sizes were significantly smaller than they are today. These three marketing professionals demonstrated their ability to grow with their firms, to play a role in the strategic direction of their firms, and to be accountable for achieving their goals. And, yes, partner expectations of marketers have changed, matching the changes in firm growth and strategy, in the marketplace and in technology. What can you do today to position yourself for the long term in your firm? 

About the Author

Jean Marie Caragher is president of Capstone Marketing, providing marketing consulting services to CPA firms including Brand SurgerySM, marketing and strategic planning, inbound marketing, retreat facilitation, and training. She is the author of The 90-Day Marketing Plan for CPA Firms: How to Create the Roadmap for Your Firm's Growth. For more information, contact her at 727-210-7306 or jcaragher@capstonemarketing.com.

