**Marketers’ Corner**

**Why Does a Marketing Culture Matter?**

*By Sally Glick*

Q: Our marketing director has recently been sharing his thoughts with the partner group in our firm on the importance of building a “marketing culture.” We are a small firm, operating in a family-like atmosphere. We frequently recognize the efforts of our employees, so for the most part they seem satisfied. I am the managing partner and none of us understand why we have to invest additional time and resources into creating a marketing culture—whatever that means. Can you help clarify this concept for us?

A: I appreciate you bringing this question to me because it is an important one for firms today of all sizes locally, nationally, and even internationally!

First, let’s begin with a discussion of what the term “culture” means in a CPA firm. By most standard definitions, a firm’s culture is “the accumulation of common beliefs, heritage, personality, values, or customs that are shared across the organization.” Although each person has his or her own philosophy, a firm with a strong culture projects a global attitude that is embraced across the enterprise, superseding individual behavior by creating a philosophy that is collectively shared by all. Under these circumstances, the employees’ behavior is influenced by the beliefs of the firm, and employees are expected to adhere to the firm’s style and strategies.

When you add the word “marketing” to the word “culture,” I think you refine the concept of culture to specifically mean “a system, a structured process, or agreed-upon behavior that is accepted across the organization and is designed to lead to consistent strategic initiatives and universal behaviors resulting in a client-focused atmosphere.”

**Making the case for a marketing culture**

Given these two explanations combining marketing and culture, your marketing director is probably trying to get the attention and support of the partners who knows must contribute to building a marketing culture if it is to gain traction in the firm.

In fact, a firm’s marketing culture is dependent on consistent partner buy-in and proactive participation. This is a critical point for you to consider. In every firm, it is the tone from the top that establishes the priorities and attributes that are most valued. If the leadership does not believe that supporting client service, client care, and superior client experiences is critical, then a marketing culture will not flourish in the firm. It is your responsibility as managing partner, and the role of all the partners in your firm, to grasp these essential facts and decide what you want to do about them. If developing a marketing culture is important to you, then you need to acknowledge the role you play in accomplishing this goal.

A firm can maintain profitability without having a marketing-centric culture, but I am personally convinced that the firms that put a significant emphasis on building exceptional client relationships usually surpass other firms over time. This is because existing clients, prospects, and centers of influence that refer business to the firm typically draw conclusions about the firm based on a formula that includes a combination of four attributes:

1. technical capabilities;
2. experience and knowledge;
3. quality client service; and
4. partner-level attention and staff responsiveness.

The key to success is to take into account the combination of attributes your firm has to offer. Your firm wants to be recognized for its professionals’ skills, business acumen, and proficiency within a niche. However, it also needs to be acknowledged for its approach to clients *(i.e.,* the excellent service and personal attention your firm delivers that has nothing to do with technical expertise, but has everything to do with its...
commitment to the success of your clients). The real significance of your role as CPA and trusted advisor lies in your firm’s ability to guide, educate, advise, and nurture your clients.

A marketing culture leads to better client service and greater profitability
When a firm focuses on profitability, efficiency, billable hours, realization, or net income per partner and gives less attention to client service, the results can have a negative effect on its future growth.

One solution to this problem is to urge employees to put the clients’ well being ahead of everything else. This is the foundation of a marketing culture, which means that firms with a marketing culture are likely to have employees who approach clients with a helpful and upbeat attitude, looking for ways to add value. The better the clients are treated, the more loyal they become. The more loyal clients are, the longer they remain with the firm, the more services they use, and the more referrals they send to you. This formula is what Harvard Business Review refers to as the “Employee-Customer Profitability Chain.” In a marketing culture, employees are coached to treat clients in a proactive manner that exceeds expectations, which in turn strengthens the clients’ satisfaction. Over the years, those super-satisfied clients contribute to the firm’s profitability.

Building a marketing culture
It must be obvious to you by now that some firms believe in distinguishing themselves based not only on their quality professional services, but also on their ability to bring foresight, vision, collaboration, and direction to each unique situation.

Premier firms understand the importance of a marketing culture (i.e., they understand the power of a culture grounded in serving clients above and beyond what is expected). To achieve this, these firms create a series of procedures that, when followed, ensure a universal approach. They also find a method for recognizing and rewarding employees who adhere to the practices. By doing this, they gain distinct advantages and differentiate their firm with the business community.

The following tips will help you and your marketing director provide employees with a strong sense of community while focusing their efforts on marketing and business development:

- Establish your firm’s vision and mission. Without a mission statement to serve as a roadmap, it will be more challenging for your firm to build a marketing culture. However, before you write a mission statement or revise your existing one, talk to your staff. Ask them what they think the firm’s mission really is; ask them to define the firm’s existing culture and then ask them what changes they think would create a more positive atmosphere. Use the staff’s comments and insights to guide you in developing a relevant mission statement that reflects your firm’s objectives. (Avoid getting caught up in the words themselves, but instead focus on the message they send.) Your mission statement can point you in the right direction as you begin to foster a strong marketing culture.
- Publish a staff newsletter. Your marketing director can enlist others in the firm to help write a newsletter that is dedicated to activities within your firm, with special attention paid to marketing and business development initiatives. The newsletter, which can (for example) be produced in Publisher or through Constant Contact, should be circulated internally only, providing the opportunity to celebrate successes, acknowledge and praise marketing efforts, share stories, and keep people connected to each other. To build pride and a sense of accomplishment, consider including lists of new clients.
- Reward networking initiatives. In some aggressive sales environments, every successful sale is noted by ringing a bell. For employees in these situations, hearing that bell ring means good news, which brings a sense of well-being that the company is accomplishing its goals. Although you may not be “ringing a bell” every time a new client engagement is signed, you can do the next best thing by circulating lists of new leads, new business, and new opportunities that have been confirmed. I suggest using the following formats: (1) publish in your monthly newsletter; (2) distribute as a separate email announcements; (3) upload onto your firm’s intranet; or (4) post on the kitchen bulletin board or in other places where this information will get attention. Maintaining confidentiality is key, so you must balance the need to promote good news
with the importance of having your staff understand that this information is for internal purposes only.

- **Launch a peer-to-peer reward recognition program.** Whenever a staff member observes a colleague doing something that contributes to strengthening the firm’s marketing culture, she or he can drop the name in a box. These names can then be read aloud at staff meetings, inserted into the firm’s newsletter, added to the intranet site, or acknowledged by the managing partner in some regular format. Some firms include a “prize” in their monthly recognition program, whether it is a gift card, a name on a plaque, access to a prime parking place, some fun gift, or a public announcement. Whether you choose to award a prize or just announce the names, frequent praise for contributions to the marketing culture helps to quickly build momentum and acceptance and serves to reinforce the behavior that is most valued in a marketing culture.

- **Provide training and education.** To establish a marketing culture, the firm’s leadership needs to be prepared to train employees on how to use appropriate business development tactics. Training through informal “lunch ‘n learn” programs or more formal group or one-on-one sessions (including practice sessions in role-play mode) can provide added reinforcement for employees who want to be more marketing conscious. The more information they have and the more time they have to practice their business development skills, the better they will become. Firms that provide the basic building blocks of training and education decrease their employees’ frustration and increase their success rate.

- **Lead by example.** No matter how much targeted training and education your firm offers, the staff really learns best from leadership. The most effective lessons come when they directly observe their leaders in action, either when meeting with prospects or when conducting client meetings. The partners in your firm need to accept that they are all role models, and the employees are looking to them for advice and assistance regarding how to improve their own business development style. Your positive attitude toward a marketing culture and client care sets the mood for the entire practice.

**So you have a marketing culture, now what?**

I hope that my response to your question has been beneficial. My goal is to help you understand why your marketing director is emphatic about establishing a marketing culture within the firm. I want you to: (1) understand why it is important to have a set of marketing customs and business development behaviors that are consistent across the firm; (2) learn how a marketing culture leads to improved client service, and ultimately profitability; and (3) have access to a list of ideas that can get you started on your way.

If you have any other questions regarding how to instill a marketing culture in your firm, please do not hesitate to email or call me! Good luck.

**Editor’s note:** If you have a specific or theoretical question about an accounting marketing topic, please email it to Sally.Glick@sobel-cpa.com. If you prefer to have your name withheld, indicate only your first name, position at the firm, and city.

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**Client Relationships**

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- client and determine a new timeframe to provide the appropriate follow-up. It is crucial to the success of your client meetings and relationships that real action, change, and follow-through occur out of these meetings.

- **Update partners and other client owners.** Be sure to communicate the results of the client meetings with partners and other key client owners. Determine what follow-up can be delegated and how issues will be resolved. Update any new client information in the appropriate databases and have the client check-in coordinator schedule the next meeting.

To enhance and deepen client relationships, make a sincere effort to get to know clients, identify additional service offerings for them, and ultimately make more of a difference in their lives. Select two of these ideas to implement during busy season and add more as the year progresses to keep clients close and competitors at bay!