

**PSYCHOLOGICAL SKILLS**  
for PROFESSIONAL SERVICES Ltd

**PSfPS White Paper**



# **Professional Services Marketing is Dead; Long Live Professional Services Marketing**

**Redefining the Role of Marketing in a  
Professional Services Firm**

**and introducing the 'Hidden Curriculum'**

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# Professional Services Marketing is Dead; Long Live Professional Services Marketing

## Executive Summary

Marketing in a professional services firm could be perceived as “*a dead end position.*”

So said Paul Bloom in the Harvard Business Review of September 1984.<sup>1</sup>

While much has undoubtedly changed since Bloom wrote his article - with nearly all professional services firms investing in marketing activities, heads of marketing being promoted to partner-level and computers no longer considered “state of the art” – in many firms the attitudes towards the role of marketing have changed little in over 30 years.

Indeed, recent research suggests that many professional services firms remain ‘two-tier organisations’ with marketing<sup>2</sup> very much in the lower tier.

Why is marketing often viewed as a ‘second-tier’ function?

In our view, it’s firstly because of the prevailing attitudes of partner and fee-earners towards marketing professionals and secondly the perceived value created for the firm by ‘traditional’ marketing activities.

Among more progressive partner groups there is little doubt that marketing has a very important role to play in their firm. However, there are many professional services leaders who remain sceptical and the challenge for professional services marketers is to convince these doubting partners of the valuable role that marketing can play.

Another major challenge for professional services marketers lies in the finding that ‘traditional’ marketing toolkit activities<sup>3</sup> create significantly less value for professional services firms than product-based firms.

While ‘traditional’ marketing tools are important for building the visibility and perceived expertise of the firm, partners remain unconvinced, believing many marketing activities are a waste of effort with their marketing teams only controlling those activities which matter least.

To overcome these two challenges, we believe it is time to redefine the role of marketing in a professional services firm. The emphasis for marketing teams needs to shift to supporting those activities

<sup>1</sup> Paul Bloom “Effective Marketing for Professional Services” – Harvard Business Review, September 1984

<sup>2</sup> And other “Support functions” such as IT/Admin/HR

<sup>3</sup> A ‘traditional’ marketing toolkit might include activities such as: Events, Brochures, Emails, Websites, Advertising, PR, Social Media, Corporate Hospitality, Sponsorship etc.

that are at the foundation of a professional services firm's success: namely, the critical interactions that occur when creating new and strengthening existing client relationships.

In our view, the dominant role of a marketing manager in a professional services firm should be to act, in effect, as a 'consultant' to the partner group. The marketing/partner relationship should mirror that of the advisor (fee-earner)/client relationship. This new role will require a re-evaluation of the core skills expected of marketing individuals, in contrast to the skills developed in a traditional marketing curriculum and career.

We believe there is a 'hidden curriculum of professional services marketing' that will give marketers the skills and abilities to succeed in their new role as 'consultants' to the partner and fee-earner group.

Only by redefining the role of marketing to focus on those activities that add real value to the firm and by developing the 'hidden' skills and abilities required in a consulting capacity, will marketing teams be able to truly add value to the firm and prove to hitherto sceptical partners that marketing deserves a place at the top table.

## The challenges facing marketing teams in professional services firms:

Recent research suggests there are two main reasons why marketing remains undervalued in professional services firms:

### 1. The attitudes of partners and principals towards marketing

**The unique dynamics of professional services firms mean that partners and principals often view the marketing team sceptically as second-tier ‘operational functionaries’.**

Being a marketing manager in a professional services firm is not easy.

Here’s a quote from a partner in a law firm taken from recent research<sup>4</sup> discussing the role of management professionals (non-fee-earners such as marketing):

***“They have a function to fulfil – they do it very well on the whole. Their views are interesting but only interesting. I wouldn’t say that they are influential...That’s not to denigrate the individuals because they are very talented ...but culturally we have a snobbery about lawyers being superior...We are very sceptical about non-lawyers frankly.”***

In professional services, unlike ‘product-based industries’, the core assets of a firm are individuals with specialist technical knowledge and in-depth client relationships. The success of the professional services firm relies on the ability of these individuals to apply their specialist knowledge to create customised services for clients.

Those with the technical expertise and client relationships hold significant authority and autonomy. Those who do not share this expertise or responsibility for client relationships – or, more crudely, who do not directly generate fees – are usually seen as second-class operational managers. This is particularly true for those working in marketing departments.

In her excellent research, Professor Laura Empson describes how:

***“Many of the fee-earning professionals in firms [I researched] appeared puzzled when asked to reflect on the role of the management professionals in their firms, dismissing them as ‘functionaries’ enacting the instructions of the partnership.”***

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<sup>4</sup> Professor Laura Empson “Who’s in charge? Exploring Leadership Dynamics in Professional Service Firms” Cass Business School June 2013

## **2. ‘Traditional’ marketing toolkit activities are not as relevant and add less value in professional services than product-based industries**

**Marketing individuals in professional services firms often work on activities that don’t add much value and have little control over activities that make a difference.<sup>5</sup>**

A recent Source Global Research publication suggested that the current role of marketing in consulting firms is often seen as ineffective and not the most suitable use of resources. We believe this research could be applied to all professional services firms.

In particular the report “Marketing in consulting firms – A two-tier society<sup>6</sup>” found:

- *“Marketing departments have lots of control over a wide range of marketing activities but that control does not extend to the things that actually make a difference when it comes to building brands, strengthening existing client relationships and creating new client relationships. That work is left to the technical experts (fee-earners)*
- *Time and money are wasted by marketing departments working on activities that don’t add much value, while organisations as a whole direct marketing effort indiscriminately at best and wastefully at worst*
- *Marketing departments appear to focus their efforts on things that can be measured rather than things that work in an attempt to prove their value*
- *Worse, marketing departments defer to consultants rather than clients in their effort to measure the performance of their firms’ brands*
- *Brands remain undervalued and underused”*

This research will probably come as no surprise to those working in marketing in professional services firms. We believe it should be a wake-up call for professional services marketers and the catalyst that brings about an honest reflection on the current role of marketing in firms.

<sup>5</sup> Source Global Research “Marketing in consulting firms: A two-tier society” 2016 p. 2 <http://www.sourceglobalresearch.com/our-reports/2381/Marketing-in-Consulting-firms:-A-two-tier-society>

<sup>6</sup> Source Global Research: Marketing in consulting firms: A two-tier society 2016 p. 2 <http://www.sourceglobalresearch.com/our-reports/2381/Marketing-in-Consulting-firms:-A-two-tier-society>

# The Current Role of Marketing in Professional Services Firms

Before re-defining the role of marketing in professional services firms, it is worth looking at the current role of marketing individuals in those firms. Why are they currently doing little to change the views held by sceptical partners that they are nothing more than ‘functionaries’?

The diagram below taken from a recent Source Global Research publication<sup>7</sup> shows the amount of effort spent by a firm (not just marketing) on different marketing activities and the effectiveness of each activity.

In short, respondents<sup>8</sup> believe marketing teams spend a significant amount of time working on marketing activities that add little value to the firm (as shown on the left of Fig.1 below).

These marketing activities are regularly found as part of a traditional marketing toolkit and include: advertising, brochures, PR, newsletters, events management and logistics, communications, social media, conferences, mailshots, emails, corporate hospitality.

Quite a bit of time is invested in regular meetings with important clients but it is usually non-marketing individuals who undertake this activity.

The conclusion from the diagram’s author is damning: “*effort looks indiscriminate at best and ineffective at worst.*”<sup>9</sup>

**Fig 1. Marketing work on activities that add little value to the firm**

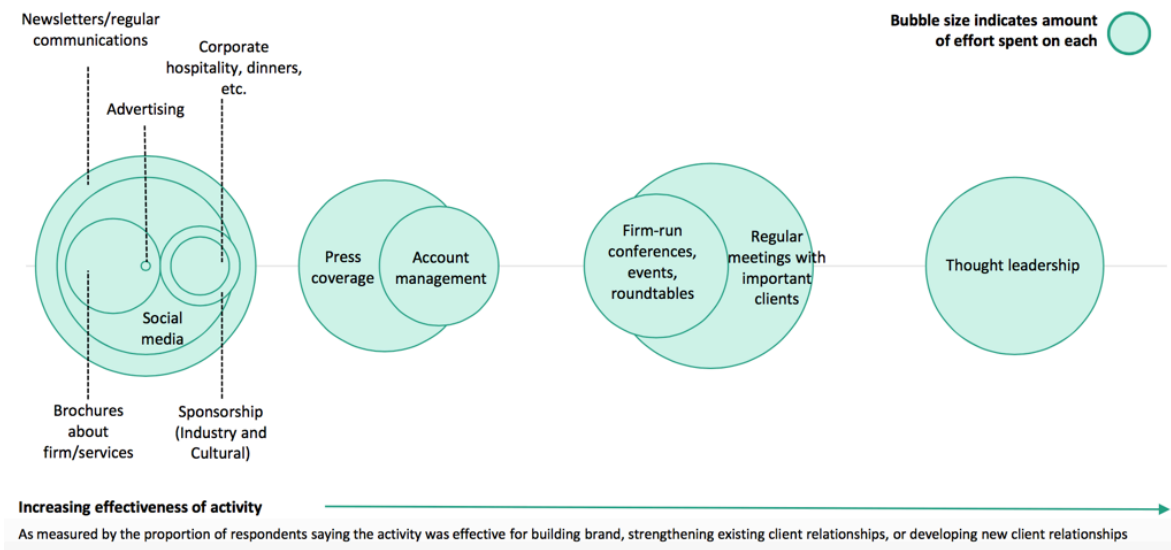


Image taken from Source Global Research “Marketing in consulting firms: A two-tier society” 2016 p.6<sup>7</sup>

<sup>7</sup> Source Global Research “Marketing in consulting firms: A two-tier society” 2016 p.6 <http://www.sourceglobalresearch.com/our-reports/2381/Marketing-in-Consulting-firms-A-two-tier-society>

<sup>8</sup> The Source Global Research report was based on the views of marketers from 30 consulting firms working predominantly in the United States (38%) and the UK (30%). Firms sampled included Big Four firms, top-tier strategy firms, technology firms, HR firms, and a wide range of small and mid-sized specialists.

<sup>9</sup> Source Global Research “Marketing in consulting firms: A two-tier society” 2016 p.6 <http://www.sourceglobalresearch.com/our-reports/2381/Marketing-in-Consulting-firms-A-two-tier-society>

## Fig 2. Marketing have most control over the things that matter least

Depressingly for those currently working in marketing, the report finds that marketing teams in professional services firms have most control over the things that matter least:

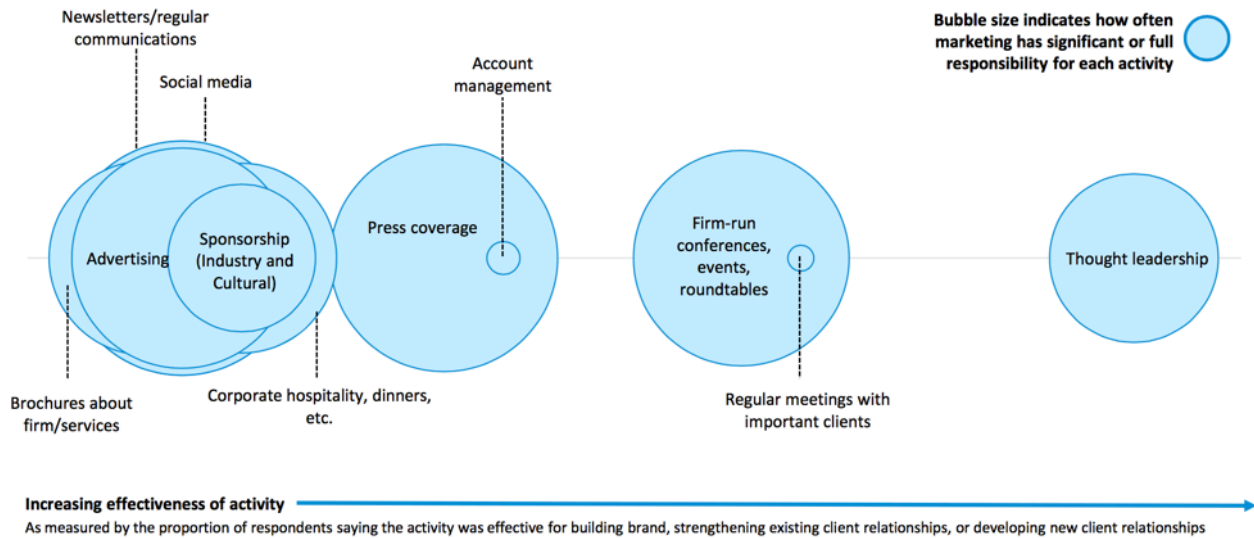


Image taken from Source Global Research "Marketing in consulting firms: A two-tier society" 2016 p.5<sup>10</sup>

Other roles typically undertaken by marketing teams but not included in the diagram above might include: website updates and maintenance, managing the CRM system, ordering stationery and business gifts, attending networking events and submitting awards entries. Marketing Managers might also be expected to produce and monitor marketing budgets, create and manage lists of targets/prospects/clients, draft tender responses and prepare and present sales figures.

Perhaps with the exception of the Marketing Manager tasks outlined above, we believe you are also likely to find many of these additional marketing activities towards the left hand side of Fig.2.

<sup>10</sup> Source Global Research "Marketing in consulting firms: A two-tier society" 2016 p.6 <http://www.sourceglobalresearch.com/our-reports/2381/Marketing-in-Consulting-firms-A-two-tier-society>



# Redefining the Role of Marketing in a Professional Services Firm

## A 'Consultant' to the Partner/Fee-earner Group

It's time to redefine the role of marketing in a professional services firm:

1. To ensure marketing teams work on those activities that really add value to the firm and
2. To challenge the attitudes of those Partners who may see marketing people just as operational functionaries.

As we have previously outlined, the success of professional services firms relies on the ability of technical specialists to both create new and nurture existing client relationships and then leverage these relationships in order to apply their specialist knowledge.

It should follow that the objective for marketing at its highest level is to carry out activities that support technical specialists (fee-earners) in these endeavours.

We are not suggesting that 'traditional' marketing toolkit activities outlined previously should be dropped entirely as there is still an important role for them to play in building and strengthening the firm's brand, its reputation for expertise and its visibility in the marketplace.

We would argue, however, that these 'traditional' marketing tactics should be applied by marketing executives/assistants/co-ordinators under the guidance of more senior marketing colleagues.

Once marketing manager level is reached, the role of marketing needs to be re-defined because the activities that will truly increase the success of the firm are those that help individual Partners and fee-earners to create new and strengthen existing client relationships.

It is still true in professional services that clients like to 'try before they buy' and meet the actual person (or team) who will be delivering the service. As such, it is unlikely that marketing individuals will get to a position where they undertake client<sup>11</sup> meetings themselves.

The fact that marketing individuals are not usually present at client meetings does not mean they cannot play a crucial role in helping the partner in advance of key client meetings and in developing a strategic approach to a Partner's account management.

In effect, a marketing manager in a professional services firm can assume the role of a coach/consultant to Partners. The marketing/Partner relationship should mirror the Partner/client relationship.

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<sup>11</sup> Please note where we say 'client' this can also be replaced by 'prospect'

## The new roles of Professional Services Marketers

Under this new marketing/partner relationship we would expect to see marketing teams:

- Offering strategic advice based on a deep understanding of the client's context, objectives, relevant stakeholders and marketplace
- Proactively offering opportunities to the partner that he could introduce to the client – “Here's what you (the partner) need to know about changes to the industry/client's situation” – rather than reactive – “What can I do to help you with this client?”
- Generating unique points of view and thought-leadership that fee-earners could deliver to the client. Clients are more inclined to trust and buy from people who have educated them
- Coaching partners before critical client conversations and rehearsing client presentations
- Building their status and credibility by challenging partners on their approaches and offering alternative strategies
- Communicating their ideas with clarity and impact – and coaching Partners in the same
- Effectively managing difficult conversations with more senior partners – particularly if their traditional approach is being challenged
- Helping partners to turn complex concepts into easy to understand language for the client
- Suggesting additional expertise/services from within the firm which the partner could introduce to add value to the client
- Providing competitor intelligence to help the partner differentiate their approach
- Critically reflecting with partners on how they could improve their performances and success rates at recent client meetings
- Helping partners illustrate relevant expertise in the specific client context
- Knowing how and why clients buy their firm's services and clearly understanding what clients value in their relationships with their professional advisers

# The 'Hidden Curriculum' of Professional Services Marketing

## Redefining the professional services marketer's skill set

The notion of marketers becoming strategic 'consultants' and 'coaches' rather than 'operational functionaries' within a professional services firm will likely be scoffed at by some sceptical partners.

However, by learning, practising and refining a new set of skills and behaviours beyond the usual marketing toolkit they have become accustomed to, marketing teams can start to work on those activities that really add value to the firm and begin to challenge the negative attitudes of doubtful partners.

The new skills and behaviours required of marketing in professional services firms might be described as the 'Hidden Curriculum of Work', as phrase coined by Jesse Sostrin<sup>12</sup>, a director at PwC's U.S. Leadership Coaching Center of Excellence.

Sostrin describes how: "A hidden curriculum exists whenever there are two simultaneous challenges where one is visible, clear and understood and the other is concealed, ambiguous and undefined."

He continues: "The value you deliver, the results you produce and the impact you have on others come more often from the execution of unspoken intangibles that are not reflected in your title, job description or the daily tasks and activities you're responsible for. This severe mismatch is based on a fundamental misunderstanding of the true demands of work."<sup>13</sup>

In the case of marketing in a professional services firm, we have seen how there are well-defined, clear and visible 'traditional' marketing activities and yet the activities that bring most value to the firm are often concealed, not reflected in daily tasks or a typical marketer's job description.

In our view, the hidden curriculum for professional services marketers should ensure they acquire similar behavioural and cognitive skills and abilities to those required of consultants - beyond the core skills often expected of marketers.

Critically, these skills and abilities not only require marketers to understand key consulting concepts but to develop the social and political skills needed to succeed in the dynamics of an often highly political professional services environment. In this environment they will be expected to coach, influence and manage colleagues with greater authority and seniority who are also accustomed to significant amounts of individual autonomy.

<sup>12</sup> Jesse Sostrin "The Hidden Curriculum of Work" Strategy + Business August 8 2016: <http://www.strategy-business.com/blog/The-Hidden-Curriculum-of-Work>

<sup>13</sup> Jesse Sostrin "The Hidden Curriculum of Work" Strategy + Business August 8 2016: <http://www.strategy-business.com/blog/The-Hidden-Curriculum-of-Work>

## The 'Hidden Curriculum'

The 'hidden curriculum' of professional services marketing would enable marketers to:

- Build credibility, personal status and reputation
- Clearly articulate a value proposition
- Coach senior partners and colleagues
- Create a strong presence and impact
- Create loyalty and trust
- Delegate effectively
- Demonstrate cognitive flexibility
- Demonstrate critical thinking
- Demonstrate sound judgment and decision making
- Develop influencing skills
- Develop logic
- Develop unseen client opportunities
- Evaluate context
- Form and deliver a point of view
- Formulate robust conclusions and present effective recommendations
- Generate opportunities based on client context
- Generate thought-leadership
- Listen effectively
- Manage conflict, handle scrutiny and difficult exchanges
- Manage critical conversations
- Manage internal stakeholders
- Manage negotiations
- Mentor junior marketing team members
- Present effectively
- Solve complex problems
- Take part in effective interactions
- Understand efficient data gathering techniques
- Undertake client stakeholder analysis
- Formulate strategic business analysis
- Use storytelling as an effective tool

For those working in professional services marketing, these skills are often not intuitive and need to be learned, practised, developed and refined through formal training, self-development or mentoring and coaching. This is particularly true for those who have worked their way up to marketing manager level without being trained in the core 'consulting skills' that have often been the preserve of the technical experts (fee-earners) in the firm.

It is up to those working in marketing functions to put these skills into practice, to work on those activities that add most value to the firm and prove to partners that they are more than just functionaries.

# Professional Services Marketing at a Crossroads

Those working in marketing in professional services firms have reached a crossroads.

They can either work on activities that perceivably add less value and continue to be seen by partners as operational functionaries or they can choose to redefine their role. In the new role, they can act as valued ‘consultants’ and ‘coaches’ to fee-earners and partners and support the critical interactions that add real value to the firm by generating work opportunities with new clients or existing clients.

In reality, the second option is the only way to prove to doubting partners that marketing is not a second-tier function or simply an ‘overhead’ within the firm. To act as a ‘consultant’ will mean learning, practising and developing a new hitherto ‘hidden’ set of skills and abilities not traditionally considered part of the marketing manager’s toolkit.

Likewise, professional services firms’ leaders have reached a crossroads.

In the excellent research report oft-quoted in this White Paper by Source Global Research the authors conclude that professional services leaders need to: “Liberate rather than constrain the marketing talent they already have within their midst”.<sup>14</sup>

We wholeheartedly agree.

Professional services leaders can either continue to constrain their marketing teams by treating them as operational functionaries who carry out the bidding of the partners, entrusting them solely with activities that add little value to the firm *or* they can acknowledge the vital role their marketing<sup>15</sup> teams could play in supporting them on critical client facing interactions.

Choosing the first of these options will do little to change the perception that marketing is a “dead end position” and continue to limit and underestimate the value marketing can bring to the firm.

The second option is likely to liberate the marketing talent within the firm and enable the marketing team to support activities that determine the success of the firm.

## Next steps

The first step for senior management teams in professional services firms must be to accept the key role marketing can play and determine whether these talented individuals are being used to their full potential in the firm. For sceptical partners who continue to see marketers as operational functionaries, this will likely be a difficult step to overcome.

<sup>14</sup> Source Global Research “Marketing in consulting firms: A two-tier society” 2016 p.2 <http://www.sourceglobalresearch.com/our-reports/2381/Marketing-in-Consulting-firms--A-two-tier-society>

<sup>15</sup> Not forgetting other support functions such as HR/IT/Admin

The second step is for those responsible for learning and development, together with partners and heads of marketing, to define the ‘hidden curriculum’ they believe will lead to success for their firm. This too will be a difficult task because, as Jesse Sostrin from PwC predicted, these skills might be ‘concealed, ambiguous and undefined’.<sup>16</sup> We hope this white paper has provided a good place to start.

Once the hidden curriculum has been defined, firms should empower their marketing teams by giving them the opportunity to learn, practise and develop these new ‘consulting’ skills.

Finally the leaders of firms need to liberate their marketing teams and enable them to put their new ‘consulting’ skills into practice. This will be particularly challenging for partners who have become used to significant levels of autonomy and consider themselves to have sole authority. For this reason we suggest the hidden curriculum for professional services marketers should also include skills to successfully navigate the social and political dynamics found in many professional services firms.

Another option for firms to consider is how to better integrate their marketing teams and fee-earners. We would suggest that all junior fee-earners are given the opportunity to spend time in the marketing department in order to better understand the role that marketing plays in the firm and the value it creates. Likewise we would suggest marketing teams are given the opportunity to shadow and observe client engagements in order to better understand the role of the fee-earners and how they can add value to the professional relationship.

### **Professional Services Marketing is Dead; Long Live Professional Services Marketing**

There is little doubt about the vital role marketing can play in professional services firms.

That said, marketing teams can only play such a role if they shift their focus from activities that perceivably add little value to the firm (even if they are taken from the traditional marketing toolkit) and instead start to influence and consult on the critical client facing interactions that will determine the success of the firm

Similarly, by acting as ‘consultants’ and ‘coaches’ for partners and adding real value to the firm – by informing, challenging, influencing, generating opportunities and solving problems - marketing teams can prove beyond doubt to sceptical leaders that they deserve a place in the top-tier.

Likewise partners and professional services leaders should realise it is in the firm’s best interest to invest in some new chairs. These should be put in each partner’s office with one placed in the boardroom. Most importantly, they should all be permanently reserved with a sign that reads:

***“For Marketing”***

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<sup>16</sup> Jesse Sostrin “The Hidden Curriculum of Work” Strategy + Business August 8 2016: <http://www.strategy-business.com/blog/The-Hidden-Curriculum-of-Work>

## About PSfPS

PSfPS design and deliver behavioural and cognitive professional development programmes worldwide.

Our clients include some of the world's leading consulting and professional services firms and also global organisations looking to adopt the best practices and behaviours from the world of professional services.

For over 20 years, our consultants have worked with more than 350 clients and trained/coached/mentored over 100,000 professionals worldwide. Clients include partners, senior executives, managers and practitioners from global firms in a variety of business sectors.

Our approach combines experiential learning and best practice with the most recent psychological and consultancy research. Programmes typically consist of a mix of presentations, individual and team coaching, group workshops, role playing and case studies. Every training programme is designed collaboratively and tailored for the client. The programmes are highly practical and rooted in real life situations, which ensures that delegates can sustain the learned behaviours well beyond the learning event.

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