



The Problem of Defining Professional Services Marketing Expertise

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In an early November [post on my blog](#), I posed the question: "Do we marketers have any idea what makes one marketer more expert than the other?" It sparked some healthy debates: What is the definition of "expertise" in the role of professional services marketing? Do a firm's fee-earning practitioners have appropriate expectations for the marketing function?

The multiple opinions that followed revealed a tremendous fragmentation in the expectations of professional services marketers.

Is marketing's role to "move the sale ahead" and to "stand behind the firm's professionals, whose job it is to create value?" In this model, marketers are expected to help grow the business within the confines of the firm's current service offerings and service delivery parameters. This model also implies that marketers exist to save the practitioners' time, money, and effort, freeing them up to do critical work that they could not do otherwise.

I'd wager that the majority of professional firms, and the majority of marketers themselves, see the role in this light.

Or should marketing's role be to "create value itself" and to "find and match marketplace opportunities with the firm's value propositions?" This model implies that marketers are deeply embedded within the business, have an astute understanding of the firm's current and potential value proposition, and have the skills, judgment, and advisory talent to help the firm carve out new or expanded market opportunities. This conceptualization of the marketing role embraces the notion of *innovation*, *creativity*, and *instinct*.

It appears that these differing expectations, and the evolution of the role of professional services marketer, have begun to fall into two distinct camps, both of which are grounded in expertise: the efficiency specialist, and the analytical specialist/market creator.

The Efficiency Specialist

The Efficiency Specialist's job is to *help make selling happen*. This type of marketer has expertise in getting potential clients to take specific actions; effectively moving the marketing tactical machine; teaching and motivating practitioners to build the firm's favorable awareness; and spending marketing budgets astutely, no matter what their size.

"Success" manifests itself in exceeding client expectations in the delivery of a marketing program—for example, a surprisingly engaging advertisement, Web site, holiday gift, client event, internal training program, and the like.

Interestingly, this is the very same area that has recently received the most scrutiny and criticism regarding its productivity and return on investment. (It's no accident that [our 2006 study](#) was titled "Increasing the Effectiveness of Marketing in Professional Firms.")

The Analytical Specialist/Market Creator

The Analytical Specialist/Market Creator embodies a role far different from the Efficiency Specialist's. This person helps *create opportunities* that weren't there before.

Consider the examples of Howard Schulz (Starbucks), Walt Disney (Disneyland), and Larry Page and Sergey Brin (Google). They have vividly demonstrated their expertise at anticipating the emerging needs of a particular market segment, preemptively developing a differentiated value proposition that matched those needs. They literally created markets.

The competencies and talent for the Analytical Specialist/Market Creator are significantly different as well. This type of marketer has the ability to grasp the fundamentals of unique value creation within the service sector: architecture, accounting, law, etc. In this case, expertise resides in the deep and critical understanding of the profession, its target

buyers, and its services lifecycle.

"Success" manifests itself in achieving breakthrough epiphanies regarding potential new value propositions, anticipating competitor moves, and comprehending deep buyer motivations. The firm can grow or sustain itself from there.

In my writing, I have cited examples of firms that have employed this model: executive search firm [Egon Zehnder International](#), management consultants [Marakon Associates](#) and [L.E.K. Consulting](#), engineering firms [Malcolm Pirnie](#) and [Nitsch Engineering](#), and accounting/business consultants [RSM McGladrey](#), to name a few.

Not surprisingly, because of the consensus-oriented nature of many professional service firms, truly breakthrough value propositions are few and far between. To date, most have had to rely on sudden market shifts to force them to seek new ways to create value (SOX in the accounting profession, for example). Also not surprisingly, marketers who have successfully occupied this role are often partners or on a partner track, or have grown up from within the profession. Some have left their firms to create their own enterprises. [Tom Peters](#) is a good example of this model.

Professional service firm executives will increasingly seek talent in this arena—analytical specialists and market creators who have distinctly different skills than the efficiency specialists. These professional service marketers will have increased business acumen and credentials; experience and skills in employing accepted market research techniques; and more comfort in leading innovation initiatives. By definition, value creators are also likely to have a stronger entrepreneurial streak than efficiency specialists, and are thus more likely to require an equity stake in the firms they join.

Professional services marketers must decide which role they want—and build expertise within it

There is clear evidence that we are in the midst of a pendulum swing regarding these two camps. This evidence appears most often in the comments from experienced marketers who have spent a career perfecting their skills in the Efficiency Specialist role, and who are increasingly being asked to provide proof that they've made a difference in a professional service firm's success. Thanks to [Michelle Golden](#) for the following very relevant points, made in her [blog comment](#) regarding successes over the last 20 years in accounting and law firm marketing:

Most firms don't know what to look for (skill wise) when they hire marketing professionals.

Many [marketers] report to people who have no idea how to utilize or measure their efforts, evaluate their recommendations, and no authority to approve their initiatives.

[Many firms] hired people with very creative ideas and they proceeded to stifle them by rejecting the most innovative ideas, failing to provide dollars, support persons for the pros to work with...

Budgets for the marketers to work with (if they are even formalized) are ridiculously low compared to all other industries. This amount includes many items that the marketer tells the firm will have little or no ROMI, such as obligatory sponsorships, sporting tickets used mostly by employees and friends, etc.—usually expenses over which the marketer has little or no control or input.

Many marketers don't even have access to their firm's financial information, including revenues by sector and historical or projected marketing expenditures.

Marketers get sucked into non-client activities in the firm such as party-planning, morale building, and recruiting....

[Most marketers] operate in environments in which feedback of any sort is scarce, written marketing plans and budgets are the exception and not the rule, and getting "time" with decision-makers is not easy.

In these and several other points made in her post, Golden crisply articulates the Efficiency Specialist's biggest frustrations: The marketer's efforts at effectively managing the process are hindered by the firm's internal clients (the practitioners and firm leaders), thus reducing the marketer's ability to be productive at supporting the firm's business development.

It's tempting for both marketers and revenue-generating practitioners to miss a key point: Expertise and "success" in this arena are about creatively and innovatively *becoming more efficient at supporting the sales of the firm's services*. Expertise lies in one's increasing ability to judge and employ the most effective process-techniques (technology will play heavily here). It's not about creatively and innovatively *identifying new market opportunities*.

In fact, both sides often have unrealistic expectations for the other. Everyone seeks more recognition for their future contributions (watch the pendulum swing!), while forgetting that they could improve their current effectiveness if only they'd

view their role objectively for the benefits it provides.

What's next for the profession of professional services marketing?

The bottom line: professional service firms' revenue-generating practitioners need to recognize their own role in the success of their marketers. They can do this by...

More clearly identifying their need for a marketing efficiency specialist or an analytical specialist/market creator

Appropriately assigning expectations for the role, based on the individual's level of expertise (novices certainly can't be expected to perform like seasoned professionals)

Building an infrastructure that allows that individual's talents and expertise to flourish

Celebrating the effectiveness and lessons learned from the initiatives that were undertaken

Recalibrating their own support of the function they originally intended or hiring for a different role instead

And marketers need to be clearer about their preferred accountabilities and the direction they envision for their own area of expertise. If a marketer is indeed in a role that requires efficiency of process, it may not be necessary to sit on the firm's executive committee or participate in strategy decisions. If a marketer desires to lead the "analysis and market creation" function, be prepared to gain expertise in the foundational aspects of this role.

Just like any industry, the field of professional services marketing occupies a place on a life cycle. We're growing up, and sometimes it can be painful.

But what a thrill to be along for the ride!



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