

10 Steps to Transform Professional Services Marketing



In this article, I cover the key actions professional services firms can take to transform marketing from a cost center, that operates as a productivity lever for practice utilization and “makes things pretty,” into a strategic function that helps firms become more competitive and achieve a higher level of performance.

The Problem

Growth is critical to the success of any professional services firm. Growth provides scale, opportunity, strategic options, challenge, and wealth. Achieving the promise of growth has always been challenging. Anyone who has worked in the world of professional services knows how unique the industry is and experienced the innate growth hurdles all firms face:

1. Matrix organizational structures, geographically dispersed professionals, and partnership hierarchies that create Byzantine operating lines.
2. Selling of sophisticated, technical, intangible solutions to sophisticated and demanding buyers through complex sales cycles.
3. Delivering a fungible “product” made up of intelligent, mobile people who think and act for themselves.
4. Playing in markets that are complex, hyper-competitive and ever-changing.
5. Pursuing competing line incentives and Machiavellian ownership structures that produce dysfunctional behaviors.

We call this operating environment and its impact the BS of PS.

High-performance marketing does not naturally thrive in this environment because

1. The technical nature of solutions makes the line professionals de facto “product managers” without the commensurate skills to do so.
2. Line utilization and productivity becomes the marketing driver, not growth, because marketers largely don’t understand their firm’s technical business and are not incentivized to do so.
3. Marketing generally defaults to operating as an order-taker for the practices.
4. Marketers are hired and rewarded for communication and design capabilities, not strategic business acumen that results in growth.

As a result, marketing is valued for its productivity in fulfilling line requests, good or bad, not for delivering growth and strategic impact firms want and need.

For the past decade, large, sophisticated professional services firms have grown bigger organically and more diversified via acquisition. Today, Deloitte, Accenture, and McKinsey are as much about digitization as accounting, outsourcing, or strategy. On the other end of the continuum, boutiques are driving superior growth by offering deep, specialized knowledge, flexibility, and affordability that mid-

market generalists don't provide. Unconventional competitors like SaaS providers have digitized services once provided by many firms (project management, research, accounting, IT, marketing, law, systems integration, et al.) and give away conventional consulting intellectual capital as "content" to attract users. These market dynamics combined with the unique operating nature of professional services has created a crisis for firms in the middle.

If firms continue to acquiesce to the BS of PS and succumb to order-taker expectations for marketing, firms will muddle along at suboptimal performance levels, squander valuable firm resources, and not achieve their primary goal, superior profitable growth.

**Big 4 Revenue
(2021)**

\$167B

SOURCE: big4accountingfirms.com

**Individual GDP of
72% of the world's
countries (2021)**

< \$167B

Source: Worldbank.org

To compete, they must change the way they market, sell, and deliver solutions.

I offer 10 steps firms can take to transform their marketing organizations into high-performance functions that will empower them to compete more effectively and achieve the promises of growth.

1. Join the Growth School of Marketing Thought

There are two schools of Marketing thought in professional services. In the *Productivity School*, Marketing exists to keep utilization high for highly-paid consultants. Marketing is a cost center. The job is to take orders and make things pretty. Its measure is production volume. In the *Growth School*, Marketing exists to drive profitable growth. Its job is strategic value creation. Marketing is a revenue generator. Its measure is strategic impact.

Research suggests CMOs who own innovation road maps, company mission and vision, customer experience, and sales initiatives are twice as confident as their peers of having an impact on the organization—and the C-suite.

SOURCE: Deloitte

These schools are not points along a maturity curve. They are competing mindsets. One marketing organization does not morph into the other. The two marketing organizations are polar opposites in terms of leadership, capabilities, metrics, and structure. Firm leadership must decide how marketing will

contribute to and measure the success of the firm, then, choose a marketing leader from the corresponding school. Transformation begins with a new mindset and much higher expectations. The future of professional services marketing is built on the *Growth School* mindset.

READ: [Two Schools of Marketing Thought in Professional Services](#)

2. Choose to Lead, NOT Follow Your Market

Professional services are about generating new ideas to solve business problems. Either you lead with your thinking, or you follow others'. Tier-one firms lead; all other tiers follow. To not choose leadership is to choose to follow.

Leading firms, regardless of size, produce innovative ideas, have a distinct POV, and set the direction for their markets. Top firms produce innovative intellectual capital that digs deeply into industry issues, examines the issues through unique lenses, and articulates a singular, and often courageous, perspective on how to solve them. More importantly, leading firms have the methodologies, models, and processes to deliver that value at scale across the firm.

Firms that follow, on the other hand, discourage innovation and risk-taking, regurgitate industry buzz, avoid articulating a brave POV, and create "content" that adds to the cacophony of industry noise.

The marketing organization required to drive innovation versus one that produces "content" are very different. Innovative marketing organizations are immersed in *Growth School* thinking and built on skills related to R&D and demand generation—strategic thinking, leadership, operations, and business acumen. The alternative is a *Productivity School* marketing organization that is spread thin fulfilling each individual practice leader's vision of his "product" and parroting other firms' thinking in your lead generation and sales support efforts (i.e., letting a rising tide raise all boats). Leaders have options when the proverbial tide falls; followers do not.

Decide if you want to eat at the table or pick up the crumbs. Transform Marketing accordingly.

READ: [Does Your Firm Have the Confidence to Be an Industry Leader](#)

3. Engineer Out the BS of PS

Each firm experiences the BS of PS in its own unique way because the organizational tension (matrix, hierarchies, politics, solution complexity, etc.) is distinctively amplified by each firm's culture. High-performance Marketing functions understand this dynamic and use it to their advantage in creating actionable and effective growth strategies. They leverage positive cultural traits to their advantage and engineer as much of the negative BS of PS "sand" out of the gears as possible.

Here are some straightforward examples,

- If matrix decision-making is cumbersome because your culture is passive aggressive or territorial, [establish a RACI that outlines who owns important growth-related decisions](#) and build your systems accordingly to avoid sub-optimal decisions, missed opportunities, or reputation-eroding gaffs.
- <https://www.prudentpedal.com/cross-selling/> If your firm lacks the trust to cross-sell, avoid account-based sales and marketing, and eliminate time-wasting account planning and share-of-wallet metrics.
- If your firm operates in siloed practices, don't communicate a collaborative brand promise that your culture can't deliver. Instead, structure marketing to build a master brand that empowers each practice to command their individual business fiefdoms and sell their "point" solutions.
- If your firm has a culture of optionality and people choose not to take your CRM tool seriously, kill the tool and build your Marketing organization to optimize client experience through your marketing automation or onsite conversion tools.
- If your firm lacks the gene of innovation, don't focus on demand generation and R&D. Instead, become exceptional at being a fast follower and selling.

All firms have some flavor of these cultural characteristics. The top firms own them and adjust their strategies, structures, and tactics accordingly. Underperformers try to hammer the proverbial square peg into the round hole. Be honest with yourselves and adjust strategies, tactics, and structures to accommodate them.

READ: [The Unnatural Act of Cross-Selling](#)

4. Identify and Pursue Your Ideal Client

If you're discounting your fees to close deals or creating a lot of build-from-scratch engagements, there is a disconnect between the value your firm offers and the client your marketing is attracting.

This means that your firm is trying to

- Attract too wide array of client types.
- Doesn't fully understand your clients' issues, purchasing process, buying priorities, culture, or needs.
- Offer services that are NOT good enough to command a premium.
- Sell to clients that do NOT value your services.

Consequently, your go-to-market strategy is sub-optimal and you're squandering solution development, marketing, sales, and client service resources. Homing in on your ideal client (i.e., the client who values the value you provide) can overcome these obstacles and make your marketing organization more effective and scalable.

Top firms have clarity about the value they offer clients; they price their services at demand equilibrium, and they build marketing organizations relentlessly focused on attracting and serving more of them.

READ: [How to Identify Your Ideal Client](#)

5. Dissect Your Ideal Client's Buying Journey Ad Infinitum

A high-performance marketing organization's number one goal is to understand the client, including his/her issues, needs, irritations, frustrations, ambitions, insecurities, goals, and pressures, and then feed that understanding back to the firm to drive growth. Without this institutional understanding, marketing cannot effectively communicate brand differentiation, the line cannot innovate, and client service can't deliver a unique client experience.

Recent Bain & Company research finds that **as few as 22%** of B2B companies consistently measure and act on their customers' experience.

A high-performance marketing structure sits upon a foundation of relentless buyer analysis that drives systems, processes, thought leadership, technology, and performance. This pursuit NEVER ends.

READ: [5 Steps to Get Buyer Journey Mapping Back on Track](#)

6. Lead with Goals, Build Process, Follow with Martech

There are 8000+ marketing technologies available. Firms often get caught in a technology platform cult (Salesforce, HubSpot, et al) or martech-as-transformation-panacea trap. Transforming marketing is NOT about installing a new technology. Firms need to look no further than their own CRM systems to learn this important lesson.

Yes, the modern *Growth School* Marketing function must exploit technology, but it must use it to support the fundamental goals outlined above. Technologies enable firms to meet potential clients where they are in their buying cycle and serve them in a way that is consistent with the firm's values and culture.

From a marketing and client experience perspective, your competitors are Amazon, Apple, and Uber. B2B and B2C buying expectations have converged. B2B buyers now demand the personalization, responsiveness, and ease they get from their preferred online service providers. These tech companies are setting the bar for ease of doing business. Building your Marketing organization to deliver anything less will leave you in your competitor's wake.

Don't jump on a cultish bandwagon, add applications that create unwieldy technology permutations, or feed undesirable BS or PS behaviors. Goals, process, technology, in that order. The result will be an empowered marketing organization capable of delivering the institutional knowledge that drives growth at scale.

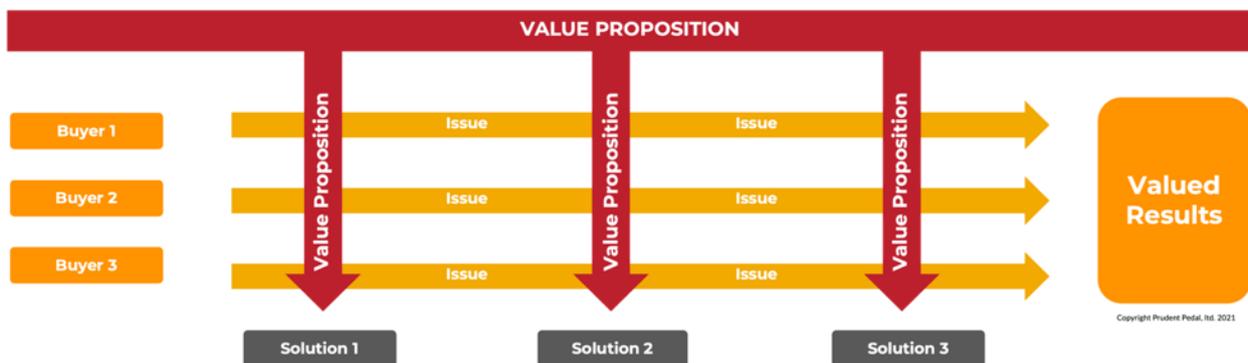
READ: [Aligning Marketing's Goals with Partner Goals](#)

7. Build Marketing Around the Client's Issues, NOT a Practice

Clients do not view their worlds through the lens of your firm's practices or functions. They see it through the outcomes they are trying to achieve and the hurdles in the way. They hire firms that demonstrate they understand their business and have the expertise and results to help them. Therefore, structure your go-to-market by client issue, then by solution and practice.

People do not buy drill bits; they buy holes.

As I state above, the BS of PS' gravitational force, if not strategically managed, will pull your marketing organization in the direction of P&L ownership and siloed priorities (e.g., practice or geography). Marketing budgets are often allocated this way and it leads to a sub-optimal use of resources because it either spreads marketing like peanut butter or gives a disproportionate amount of capital to past-their-prime cash cows. If firms want to achieve superior growth, it's time to jettison this outdated approach.



No matter your firm's technical competency or industry (IT, accounting, strategy, etc.), your ideal client's issues will fall into one of three value buckets: growth, efficiency, or risk. Marketing's job is to define the issues your firm will own and demonstrate ownership through your firm's brand positioning and marketing strategy.

READ: [The Marketing Trend Devouring Your Core Business](#)

8. Sell Clients How You'll Serve Clients

Clients know far too well that, *"How you sell me is how you serve me."* The world is filled with blather. Don't build a marketing organization that adds to it. Build your Marketing organization to DEMONSTRATE your brand promise, not simply to "communicate" it. That means don't waste Marketing time, resources, and energy creating value posters and tchotchkes that add little to building client experience.

Instead, invest in tools that enable the right behaviors at the moments of truth (service delivery models, sales methodologies, meeting/event protocols, CRM tools,

listening skills, knowledge management tools, client research, etc.) Marketing should be playing a key role in cultivating the supporting structures and systems that develop employees who show up as the best version of your firm and differentiate you throughout the client experience.

READ: [Three Mindsets of Long-run Salespeople](#)

9. Think Smorgasbord NOT Prix Fixe

Professional services people swim in the ocean of the complex sale. Each firm, partner, business developer, buyer, opportunity, and issue is unique. The communication flow is not linear. The permutations of individual interactions are infinite. Some professionals need brochures, some presentations, some assessments, others just a legal pad. Some want case studies, some white papers, and others to press the flesh at events.

Build your marketing organization, processes, and tools to accommodate this complexity while delivering the necessary scale to achieve the right type of growth. Create systems that empower your high performers. Eradicate the demands that enable the weaknesses of underperformers and avoid unscalable one-offs.

I often use the blue Tiffany box as a metaphor for scaling marketing “collateral.” The blue box is more than 100 years old and is recognized by virtually everyone as the promise of an impeccable gift. Tiffany employees don’t change the color of the Tiffany box or tie its white ribbon in a knot. Their role is helping shoppers choose the beautiful gift that goes inside the box. Marketing must create your “box” or (i.e., processes, systems, and templates) and let the partners and business developers govern the gift inside (i.e., deliver the firm’s value proposition).

Approaching marketing support as a smorgasbord, not a la carte, allows marketing to achieve scale and provides a consistent brand experience while enabling the individualize client experience needed in complex selling.

According to research by Miller Heiman Group and CSO Insights, 68% of B2B buyers see little or no difference between vendors, largely due to a lack of insight provided during the decision-making process. In a survey of 500 decision-makers, only 23% of buyers said they identify salespeople as a top three resource for solving their business problems.

READ: [The Marketing Brochure and the Peter Principle](#)

10. Invest in your marketer's understanding of your firm's business

You groom your line people to grow and understand the business every day. Practice leaders, partners, and consultants are immersed in the business each day—working with clients, managing accounts, budgeting, addressing people issues, continuing education, sales training, developing research, etc. Do the same for your marketing leaders. I'm not saying that they need to be experts in tax law or the latest programming language. I am saying they need to understand how money is made.

Ask, "What am I doing to help marketing develop a deeper understanding of our business? Who has responsibility for working one-on-one with the marketer to explain the business? How often is the marketer with the functional leaders in finance, IT, operations—or even sales—understanding the demands of the business? The next time your marketer goes to an association meeting, instead of having him staff the trade show booth, have him attend the seminar so he can get smarter about the business.

Hire marketers with operational chops and business acumen. Then, set the expectation that they must understand the business of the business on their own and with your help.

READ: [Why Your Marketer Doesn't Understand Your Business](#)

Conclusion

If your firm wants to remain relevant and achieve the level of growth and scale required to be competitive, it needs to rethink its expectations of marketing and transform its marketing approach.

Firm leadership must structure marketing in a way that it can measure and deliver strategic impact. That means

- Adhering to a new mindset aligned with the *Growth School*
- Choosing to lead your market regardless of its size or competitors
- Recognizing the BS of PS' impact on your firm and how you can exploit it or engineer it away
- Homing in on clients that value the value you provide

- Relentlessly understanding that client's issues and solving them better than all comers
- Building marketing processes and systems that scale learning and productivity worthy of the 21st century
- Enabling your people to show up as the best version of your firm every time
- Investing in business acumen and development of your marketing team

Doing any less will make you firm a follower and threaten your long-term viability.



About the Author

Jeff McKay is the Founder and CEO of Prudent Pedal.

As a strategist and Fractional CMO, Jeff helps service firms set smart growth strategies in motion. He cuts through the BS of PS to help firms achieve their growth potential by aligning a firm's core capabilities, market opportunities, and brands. His strategies have helped some of the world's top professional services firms achieve industry-leading growth rates, optimize marketing investment, and maximize brand value.

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