

## Think Strategically: Align Marketing Efforts with Firm's Vision and Goals, Written or Otherwise

Though they may have different definitions for what it means, many accounting firms are turning to strategic marketing to push toward both short-term and long-term goals.

Put simply, strategic marketing is about aligning marketing efforts to the firm's overall goals and initiatives, regardless of whether those goals and initiatives are formally stated or just understood. And that puts strategic marketing within the reach of just about any firm; all it takes is determination and a clear vision.

### Focus your efforts

While many firms have marketing plans, often those plans are not implemented consistently because marketers get sidetracked by the pressures of day-to-day deadlines.

**Tracey Segarra**, marketing director at **Citrin Cooperman & Co./New York**, says a one-person or two-person marketing department may not be able to stop putting out fires, such as meeting partners' requests to help with PowerPoint presentations and client proposals the day before they are due.

"To get them in the habit of including me is great," Segarra says of partners, adding, though, that the last-minute nature of marketing work at many accounting firms keeps marketers from thinking strategically. "If you want to do strategic marketing—which I think all firms need to do and I think no matter how small or large you are,

you *can* do—you need to take the time and plan."

A strategic marketing plan can help focus a firm's marketing efforts.

"It's your roadmap," says **Jean Caragher**, president of **Capstone Marketing/Chesapeake, Va.** "The plan itself will keep a professional focused on the campaigns they've outlined. The plan will have a timeline and a budget."

### Getting started

In an ideal environment, strategic marketing begins with a firm's overall strategic plan and sets out specific courses of action to work toward those goals, Caragher explains. "All of it needs to support the overall goals and vision of the firm so that you're making informed, logical marketing decisions."

But if your firm doesn't have a strategic plan in place, don't be deterred. Strategic marketing is still possible; it's just more difficult.

Start by analyzing the firm's niches and specialty areas and develop a strategy to match those. The plan should include both revenue goals and client goals. And, it must have partner buy-in. Caragher suggests starting with your firm's vision and growth goals to make sure partners are on board with where you want to go. If there is no stated vision, talk to partners and gauge their expectations for the firm.

"Firms have different personalities and partners have different goals," she explains. "Some firms have partners who...are making a good living and they're

not looking for real aggressive growth."

Feedback from the firm's leadership should show you which direction to take.

"One of the things the managing partner wanted me to do when I started was to go out and have lunch with every single partner," Segarra recalls. She suggests asking a lot of questions about how the firm got its start, how it has grown and where partners see the firm's future.

"The main resource you need for strategic marketing is curiosity—really understanding what makes the firm tick, learning and understanding how the firm is different from competitors," Segarra says. "If you're a marketing director or the only marketing person at a firm, you have to...understand on a macro level what the firm is all about. You have to be able to talk to partners at their level."

In fact, by asking questions, marketers may help uncover understood but unspoken values the firm can build on. The values exist, regardless of whether they are written down on paper.

### Key elements

Once the firm's vision, goals and direction have been identified, whether in an overall strategic plan or less formally, set your marketing plan accordingly. Caragher says a strategic marketing effort should include several key components:

**1. A mission.** What do you want the plan to accomplish?