

Many Roles, Many Hats Perspectives from a “Do-It-All” Marketer

BY MICHELLE WIESNER, CPSM

Are you the wearer of many “hats” as a marketer in your firm? Are you tasked with proposal and collateral development and also engaged in business development, graphic design, public relations, trade show planning, advertising, and coaching? It is important to remain organized and sane while investing in your professional development. How do you successfully do it all? How are you evaluated for such a diverse role?

This article addresses a number of strategies and perspectives used by marketers who are the single source for marketing and business development in their firms. Might that be you?

You know who you are. For your A/E/C firm, you are a business developer, marketing professional, trade show guru, office cheerleader, etc. Being the one and only marketing and business development person in your firm may come in different forms or with different titles, but if you are the only source for business development and marketing in your firm, you must have a unique combination of skills: vision, creativity, design capabilities, strong writing and proposal development skills, sales and relationship building skills—all of which work together to help sell your firm’s services.

While we generally come from different backgrounds, we do have a few things in common: Most of us enjoy variety, the unexpected, and the challenge of “figuring things out,” as we all realize at some point that we are not going to excel at everything we are expected to do in our respective roles and often have to handle situations in which we do not have extensive experience. In fact, the balancing act of attempting to be “many things to all” is a skill so unique that not many are really suited for it, which is why many firms have different types of people with varying skill sets in business development and marketing roles.

To compound this, some of us work in firms where the two roles of business development and marketing are not well integrated at the upper management level. Suzanne Lowe’s book released in July, *The Integration Imperative*, addresses some of the issues that arise when the two functions are distinctly separate in a firm’s environment. “Because of a number of structural and cultural silos, most professional and B2B service firms’ marketing and selling functions are not optimally integrated. Their marketing and selling ‘disconnects’ prevent them from competitive effectiveness, impede their financial success, and hinder them from delivering optimal client service.”

Even if you work with principals and firm owners who recognize the importance of integrating both roles, you may not have established the best way to communicate and truly work together to allow all involved in both functions (both you and principal business developers) to maximize success and accountability. Much of this stems from the immaturity of the marketing and business development functions within the professional service firm. Says Lowe: “PSFs (professional service firms) haven’t always had marketing and business development, so these functions are still somewhat immature. Even today, it’s not uncommon to hear about a professional firm hiring its first-ever marketing coordinator or business development professional.”

Issues can arise when upper management, which heads up either or both roles, does not communicate the company vision well or does not work with you in developing long-term and short-term goals for both functions. This is most apparent in the current economic cycle as Ms. Lowe notes, “In ‘up’ economic cycles, professional service firms’ traditional approaches to the structural framework of marketing and business development (its processes, skill sets, and administrative support) appear effective and efficient. But when the marketplace sputters, as we’re witnessing currently, these structural frameworks are revealed for what they often are—less than optimal hodgepodes badly in need of overhaul.”

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No company or workplace is perfect. While many of us are working on building better relationships, communications, and goal setting in general, we can control only what we produce individually as professionals working in both worlds of selling and marketing. We have our own methods of staying organized, but we all generally balance time in some way between the business development and marketing responsibilities of our jobs. Sometimes this can happen in the natural progression of tasks between the marketing and the proposal piece.

Below are perspectives from "do-it-all" marketers on organization/time management, performance goals, and time allocation between business development and marketing. Clearly, each of these topics could be analyzed more extensively than they are in this article, but below is a snapshot of how marketers in A/E/C firms are managing such a broad role.

Organization and Time Management

As we all know, proposals and deadlines in general dictate a large chunk of our time. When there is a deadline, business development often goes by the wayside until things slow down—for both marketers and business developers as well as the upper management of a firm. Restarting these efforts can be a challenge especially when other important responsibilities are competing for your time such as trade shows, database maintenance, filing, etc.—the list goes on. We also know that, if some of these tasks do not happen simultaneously, nothing moves forward. Whether you make an old-fashioned to-do list or schedule reminders in Outlook or on a Blackberry, "do-it-all" marketers have to manage the details of everything going on at all times. One of the marketers I spoke with said that he tries to avoid conducting marketing and business development simultaneously beyond answering a few follow-up e-mails or correspondence.

- From **Brook Jensen**, director of marketing and business development, KSQ Architects, Tulsa OK: "There is a red folder that always sits to the right of my computer. The folder is my ticket to remembering all of the marketing tasks that must be completed within the next six months. I try to keep this folder to only six months, so that I feel accomplished as I complete the tasks. A sense of accomplishment is very important to the success of your marketing/BD program. Also, support from and communication with your principals is crucial. The ability to be efficient with both your time and theirs will produce a productive relationship, thus generating a more superior result."
- From **Grace Redovich, CPA**, director of business development and marketing, Welman Architects Inc., Waukesha, WI: "Organization is the bane of business development. It makes or breaks us. I have a Franklin Covey one-page-per-day spiral notebook. I call it 'my brain.' I write every phone message in there, list with whom I meet, whom I call, etc. It is a scribbled mess, but everything I do is recorded in there. I move the

"to-do" list day to day. Writing it out forces me to face it. When a proposal is due, the BD side of me takes a back seat. Proposals come first. I allow myself to realize that I can't do it all. I work hard and what doesn't get done...couldn't get done by one person."

- From **Lisa Jelliffe**, director of marketing and business development, WorthGroup Architects, Denver, CO: "I do use tools like writing everything down in a to-do list, using Outlook religiously, and do not allow distractions like personal e-mail or social networking."
- From **Bernie Siben, CPSM**, principal consultant, The Siben Consult, Austin, TX: "For me, the split between marketing and BD activities is rarely planned, because everything is governed by how much time is left *after* the project work is done. I use a card system to prioritize the marketing and BD work. When I think of something that needs to be done, I take one of my 3"x 5" pocket cards and make a note. I always include a brief description of the idea and the process I think will work so I don't look at the card two weeks later and draw a total blank. The stack of cards stays on my desk. At least once a week, I go through the cards and see if priorities need to be changed or if any ideas no longer seem worth the effort. What seems brilliant on Monday often seems a waste of time on Thursday. Whenever I finish a project, I try to get to at least the top BD/marketing card before the next project starts. Sometimes I get through three or four cards before the next project arrives. When I finish a card, I tear it up. Generally, once a week, I go through every e-mail still in my in box and move it wherever it needs to go: project files, marketing files, personal files, trash, etc. Looking at everything once more as I do this helps ensure that everything I've committed to actually gets done, things are stored where I can find them later, and the box isn't cluttered with things I don't need to save."
- From **Jodie Day, CPSM**, business development manager, Williams + Paddon Architects, Sacramento, CA: "Looking down the road over the next few weeks is the most important thing I do to manage my time. Every week I look at what I have coming up not just next week but over the next few weeks. That allows me to organize necessary tasks up front and take care of small stuff early so they don't fall through the cracks. If you find yourself just barely keeping your head above water day in and day out, then you need to take a step back and re-evaluate what you're doing and how you're doing it, because you can't be successful over the long haul when you're in that mode."
- From **Barbara Shuck, FSMPS, CPSM**, vice president and marketing director, Emc2 Group Architects Planners, Mesa, AZ: "With the dual-roles of marketing and BD, I appreciate the ebb and flow in marketing deadlines. There's always a season for catching up on reading, filing, and other less time-intensive marketing tasks. Finally, meeting with clients is always a priority,

so I schedule those types of meetings far enough apart so I can work deadline-driven tasks around them. I find that if I set up too many back-to-back meetings, I'm less effective in managing my schedule because it can change significantly when a new RFQ has been published."

- From **Kerry Ann Craft**, director of business development and marketing, Alfred A. Webb Associates, Riverside, CA: "One way to manage time is by taking control of submittal and interview meetings through the use of agendas and schedules. Agendas allow us to quickly run meetings, yet still receive the information we need to go forward. Schedules make the team accountable for providing materials well in advance of the required deadline to allow us a comfortable amount of time for proper QA/QC and delivery."

It's a constant challenge to maintain control of all the "balls in the air," but some of the organizational issues have to do with the establishment of realistic goals and a road map that we can use to be successful. This might exist in your marketing plan but can also exist in the expectations of upper management and open dialogue with the boss when it comes to setting performance goals on an annual basis.

Determination of Performance Goals

The determination of performance goals is handled (or not handled) by firms vastly differently. While it is important to have measurable goals by which to be evaluated, if you are working in a firm that hasn't previously had a marketing/business development specialist, this may not exist and you may find yourself writing it. Many firms ask employees to maintain task lists to determine what has been accomplished in any given year for use in annual performance reviews while other firms evaluate the overall hit rate as a consideration. By far, many of the marketers and business developers I spoke with either do not have performance goals or the goals are very vague. However, regardless of whether you have defined, measurable goals as a "do-it-all" marketer, you likely have them by default in conversations or expressed goals by the owners or principals of your firm.

Below are a few anonymous responses regarding the existence or non-existence of performance goals.

- "Performance goals are not standard in my firm, especially for marketing employees."
- "I am not in a highly structured firm, so the goals we use to rate me are self reported. I look at the proposal-to-interview ratio, and I listen carefully at post-mortems to see if anything I wrote or produced helped to win or lose an interview. Business development and marketing successes are very difficult to quantify."
- "I don't have 'sales' goals as far as bringing in a certain dollar amount. On the marketing side, it's based on win rate to some

degree but also about making sure proposals are on time and well done, being organized so that staff has enough time to complete their parts of a proposal, and the research/background work I do for proposal and interview teams."

- "Completed items shown on our task list are one way of measuring performance. Of course, our hit rate for submittals and interviews is also considered. Perhaps the most subjective method and one of the most important, is client satisfaction, where we consider our professional staff to be an internal client of our department."

Management of Time Spent on Marketing vs. Business Development Activities

While some firms have defined ways to delegate time between both roles, some multi-task and find a collaboration between the two in their everyday work. Many have a proposal/marketer side and then when the deadlines (namely proposals) are completed, the business developer takes over—for some the two roles are so intertwined that separating them is virtually impossible.

Below are a few perspectives on how "do-it-all" marketers manage their time between the two roles.

- From **Amanda Sigafoos**, marketing and business development, RIOS CLEMENTI HALE STUDIOS, Los Angeles, CA: "Essentially, I manage my own time so I allocate according to the need or a particular strategy. I just went through a long period where all I needed to do was respond to proposals. Now I'm more in the BD part—catching up with people; initiating contacts, lunches, events; making connections; and so on. I'm also allocating time to work on our image database."
- From Barbara Shuck: "The majority of my time is dedicated to the *high-payoff activities* of actual work procurement where I have the most skill, expertise, and immediate bottom-line benefit: project tracking, strategy setting, proposals, and presentations. My BD responsibilities are to meet with clients and consultants as much as time allows (especially at conferences and networking events), but mostly to track clients and encourage/manage our technical staff to meet with specific clients for specific project pursuits."
- From Bernie Siben: "I don't try to do all three activities—BD, marketing, and project work—all the time. Very often, BD and marketing efforts stop while I work on a project. What little gets done while working on a project will happen late in the evening, which I find is a good time to stop and write e-mails in response to client (or potential client) questions about how my strategic or training services might be of help to them."
- From Jodie Day: "It's not a 50/50 split, and it depends on what's happening this week or this month. Some weeks I spend a huge amount of my time on BD, and other weeks I don't have

more than a few hours to spend. Being organized keeps the priorities set. For us, the Golden Rule is that a proposal deadline is the most important priority, and everyone understands that and works well to get us what we need to complete a proposal."

- From Brook Jensen: "Overall, each responsibility receives equal care; however, I could work on nothing but business development for an entire month and then switch back to a marketing campaign. I believe BD and marketing should run hand in hand. One without the other will fail. If I haven't done proper market research, then prepared the client-appropriate/branding-focused campaign or materials based on assumptions, the business development directive will not succeed."

Whether we have detailed marketing and business development plans that we use to lead us, or if our road map is more of an outline, it is a unique position you have as a dual marketer/business developer. You are a driver of two of the most critical elements of your firm, especially in the current economic climate. While no

one has all the answers to how to perform both roles seamlessly, the organization you employ in your many roles as well as the vital part you play in educating your firm's upper management will serve as the best way to better integrate the two functions successfully in the professional services firm. ■

About the Author



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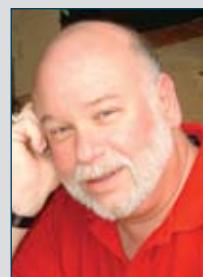
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