



## Inspiring Young Marketers

Welcome to the PCPS Brief—the monthly newsletter that synthesizes information, news and resources around a particular issue or concern and offers actionable ideas for your practice.

In the past, younger professionals often made the effort to bring in new business because they were interested in advancing within the firm, which in most cases meant moving toward partnership. But many practitioners today find that young CPAs express mixed feelings about becoming partners because of the demands that it will place on them and the damage it may do to their personal lives. Of course, marketing itself is also a time-consuming activity, and one in which even the most promising young staff members may be reluctant to engage.

Marketing consultant Wendy Nemitz says firm leaders can motivate younger CPAs to become great marketers if they better understand the issues involved. Nemitz, of Ingenuity Marketing Group in St. Paul, Minnesota, believes that firm leaders need to revise their perceptions of what younger professionals want. For the most part, she notes, the people leading firms today are from the Baby Boom generation, born between 1946 and 1964. Because of the size of this generation, “they are used to competition and working hard. In addition, they tend to define themselves by their careers, so their professional identities are very important to them.”

Generation X, born roughly between 1965 and 1981, is a smaller group that grew up during a time of tremendous cultural change and sometimes in families that experienced divorce. As a result, according to Nemitz, they place great value on home and personal lives. After seeing their parents laid off in corporate downsizings, they are also less likely than Baby Boomers to rely on employer organizations for career stability. On a professional level, “they are most likely to place their faith in their own skills and experience, which means that training and opportunities to learn are very important to them. They also grew up with technology, so they won’t tolerate employers who aren’t up to date.”

In “Generational Shift: What We Saw at the Workplace Revolution,” Bruce Tulgan & Rainmaker Thinking, Inc., a marketing consulting firm, point out the trends that have taken place in recent years that are driven by the changing work environment and new expectations from younger workers. It can be found at <http://www.rainmakerthinking.com/genshift.doc>.

### *Making the Best Choices*

Many CPA firm leaders recognize younger staff members’ emphasis on their personal lives and respond by offering them flexibility in their schedules, but that’s only one piece of the puzzle, according to Nemitz. While flextime accommodations may keep staff with the firm, they will likely not motivate them to become better marketers or to strive to

become firm leaders.

“It’s not about tangible, logical things. It’s about identity,” she says. In one example of the gap in understanding between the generations, Nemitz recalls a partner who told a promising young staff member about the many hours he had put into creating the firm, and how he had missed many weddings and soccer games as a result. “He was trying to tell the young staff person that this great firm had been worth the sacrifice, and now the young person had the chance to become an owner in this wonderful practice,” she says. “What the young person heard was that you have to give up your life to be a partner, and he wanted no part of it. If Baby Boomers don’t understand this perception, they will never have a profitable conversation” with younger staff members

Partnership, then, should not be presented as a professional identity to be enjoyed—something that may not be a top priority for a Gen Xer—but as a position that will give them control over their own lives. “Partners should tell younger staff members that partnership gives them power over their own futures,” she says.

While this may be a good first step, how can junior staff be convinced to become better marketers, a job that often requires attending meetings or networking sessions on evenings or weekends? Instead of leaving them to take a scattershot approach to making contacts and raising their visibility, firm leaders can help staff make more efficient choices, Nemitz advises. So, rather than expecting staff to attend a long list of functions or go to several meetings to see if a group is worth joining, she advises firm leaders to help young staff to make the most of their marketing efforts. “Don’t tell them, for example, to join some not-for-profit organizations. Have someone research the local groups or use your own experience to pick the ones that would be best for a member of your firm to be involved with. Then coach them on how attain visibility and make a meaningful contribution.” She advises firms to use the Web to learn more about different groups and the committees, connections or activities that would be most valuable within them. “Don’t expect them to go to endless wine-and-cheese events,” she says. By offering good advice, “give them the tools they need to be effective.”

#### *One Firm’s Solution*

Once firms get a sense of what might motivate younger CPAs to become better marketers, what’s the best way to put that knowledge to work? At Lattimore, Black, Morgan & Cain, P.C., in Brentwood, Tennessee, the development of marketing expertise is presented as an investment in the future—an approach that should appeal to Gen Xers seeking to expand their portfolio of skills.

“No matter where they go in their careers,” says marketing director Leisa Gill, “this is a learning experience that they can use.”

In the firm’s definition, marketing begins with taking good care of clients. In “Quality Client Services,” a PowerPoint presentation available free to members on the [PCPS Firm Practice Center](#), the firm sets out expectations for client service that include:

- Work hard and get along with your peers and clients.
- Be the best you can be at what you do.
- Get to know your clients and take a personal interest in their success.
- Be responsive to them.

- Understand the firm's services.
- Honor your commitments.
- Be professional and responsible to your clients and each other.
- Follow the rules.
- Adhere to the firm's core values.

Firms of any size can create a list like this for their staff or adapt or elaborate on this one for their own needs. This step ensures that staff understands firm leaders' expectations. It also reinforces the firm's values and demonstrates the practice's commitment to professionalism.

Gill's firm has marketing activities guidelines that state responsibilities for each level in a professional's career. Depending on where they are in their advancement, firm members might be expected to attend networking functions on a certain basis, for example, or join an industry group. "Adhering to the guidelines has become a factor in our annual evaluations, which includes raises and promotions," Gill says. "The marketing effort is considered to be another part of your work and career development. The responsibilities start at the staff level, including administrative staff."

As another step in the process, the firm recently put together a continual learning platform that sets forth not only the technical and systems knowledge that firm members should have at each level but also the marketing and business development skills. "It starts simple, focusing on how to deliver good customer service, but as people advance it includes everything from how to transition a client to another team member to how to build the next generation of partners." The firm has hired a learning coordinator who will determine what kinds of courses will address the training needs in the platform. "Some may be developed for us, or they may be Web-based, provided by outside vendors or taught by people in our firm," Gill says.

Development of the platform recognizes the firmwide responsibility for marketing. "In the past, we selected people with particular marketing talent for our rainmaker program," she says, "but we decided all firm members need marketing training. Everyone at the organization can be an example of what the firm is about." The firm believes that consistency is important to its market effort, which means creating uniform standards for customer service and established expectations about issues such as communicating with clients and being involved in community and professional organizations.

Firms of any size can develop basic responsibilities and guidelines that reinforce the idea that marketing is one facet of being a professional. The PCPS Firm Practice Center provides a wealth of marketing resources and information in the "Resources" section at [www.aicpa.org/pcps](http://www.aicpa.org/pcps). In addition, the [CPA Marketing Toolkit](#) provides many tools that younger staff members may be able to use, including speeches and marketing, customer service and client satisfaction tips.