

# Hiring and Integrating Marketing and Sales Talent

By Sarah Johnson

It is no secret that growth is one of the top challenges facing public accounting firms. For over a decade, the AICPA's Private Companies Practice Section (PCPS) CPA Firm Top Issue survey has listed new client acquisition and client retention as one of the top five issues facing firms of all sizes. Firms that are successfully addressing these issues are embracing marketing and business development.

For many firms, the idea of hiring staff to help support firm growth is highly appealing. But what is the first step? How does a firm prepare for hiring and successfully incorporating this new employee?

And, how does a firm turn the staff member into a successful investment?

## Preparation is key

Firm executives often ask: How large does a firm need to be before it hires a marketing or sales professional? The honest answer is that there is no correct answer. The proper time for many firms has more to do with mindset, culture, and expectations.

Often, firms jump into hiring marketing or sales professionals before they are prepared, which can have a negative effect on firm growth and, even more importantly, on firm culture. Before a firm takes this step, it should do the following:

- *Gain buy-in from key stakeholders.* Leaders are sometimes several steps ahead of their firm. Although this is an admirable and necessary quality, firm leaders need to ensure their team is prepared for change. A growth culture should be established before hiring staff, meaning there are expectations and accountability around growth of the firm, as well as a willingness or desire from partners to do more, while being supported for their existing efforts.

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- *Be ready to participate.* While marketing and sales professionals help drive and support growth for their firm, they are not magicians. Growth requires collaboration by everyone in the firm. A marketing or sales professional without the support of leaders and participation from professionals will not succeed.

- *Manage your expectations.* Organic growth is not instantaneous. Regardless of whether a firm is hiring a

marketing or sales professional, it takes time for a new employee to be properly integrated into a firm and for the firm to start seeing results. If this is a firm's first hiring venture, it will take most firms ap-

proximately 12 to 18 months to see consistent revenue outcomes.

Of course, firms that are not prepared to hire a marketing or sales professional have many available alternatives. The primary option is to hire specialty agencies to support specific projects, such as website development, graphic design, copywriting, public relations, or search engine optimization (SEO). A firm can also opt to hire a consultant to help address the challenges that may be preventing it from hiring a full-time marketing or sales person. A consultant will often have a broader set of skills than a specialty agency and ideally have experience working in an accounting firm.

## Determining firm needs

Once a firm is ready to hire a marketing or sales professional, it needs to determine its needs and expectations. There is a common misperception that marketing and sales are the same. Although they are not the same, they do complement each other, and both are necessary. Marketing primarily focuses on activities that are one-to-many, such as communications, branding, events, or public relations. Sales activities are one-to-one, such as

Exhibit 1: Marketing and Sales Role Responsibilities		
Role	Skills	Years of Experience
Chief Marketing Officer (CMO) / Chief Growth Officer (CGO)	<ul style="list-style-type: none"> <li>• Sets the firm's growth strategy (includes marketing and sales);</li> <li>• Works closely with key leadership team and niche leaders to identify and implement strategies to achieve their goals;</li> <li>• Oversees firm's marketing budget;</li> <li>• Oversees the execution of the firm's marketing and sales strategy;</li> <li>• Develops and manages the marketing/growth team;</li> <li>• Supports firmwide partner development and professional education in sales and marketing;</li> <li>• Directs the development of new services/niches; and</li> <li>• Coaches/supports partner sales pursuits.</li> </ul>	12+
Marketing Director/Manager	<ul style="list-style-type: none"> <li>• Develops and implements the firm's marketing strategy;</li> <li>• Directs all marketing activities;</li> <li>• Manages the firm's marketing budget;</li> <li>• Works closely with HR or Recruiting to support recruiting campaigns;</li> <li>• Supervises any other marketing staff members;</li> <li>• Attends meetings with key niche leaders and CMO/CGO regarding marketing strategy;</li> <li>• Meets with partners regularly regarding their marketing activities; and</li> <li>• Participates in marketing training/education firmwide.</li> </ul>	7+
Marketing Coordinator	<ul style="list-style-type: none"> <li>• Implements marketing tactics at the direction of the marketing director and CMO/CGO;</li> <li>• Maintains and tracks progress of marketing activities and other reports;</li> <li>• Coordinates events;</li> <li>• Maintains firm communication materials and promotional items;</li> <li>• Maintains the firm's websites; and</li> <li>• Coordinates outside vendors (<i>i.e.</i>, graphic designers, copywriters, or public relations).</li> </ul>	0-7
Specialty Positions	<ul style="list-style-type: none"> <li>• Graphic designers;</li> <li>• Copywriters;</li> <li>• Media (PR or Social);</li> <li>• Web (developers/SEO); and</li> <li>• Telemarketers (call on prospects).</li> </ul>	n/a
Business Development Manager	<ul style="list-style-type: none"> <li>• Meets assigned sales goals for new business;</li> <li>• Conducts in-person lead generation activities;</li> <li>• Participates in firmwide lead generation activities;</li> <li>• Generates and qualifies prospects;</li> <li>• Manages the sales process;</li> <li>• Manages sales pursuit teams (partners/managers) for opportunities;</li> <li>• Provides information for proposals and participates in development as necessary;</li> <li>• Maintains sales pipeline;</li> <li>• Responds to requests from prospects; and</li> <li>• Participates in client retention activities.</li> </ul>	7+
Sales Coordinator	<ul style="list-style-type: none"> <li>• Manages and maintains firmwide CRM system;</li> <li>• Manages and maintains firmwide pipeline;</li> <li>• Generates new business development reports;</li> <li>• Coordinates sales/prospect meetings;</li> <li>• Prepares proposals with partner input; and</li> <li>• Coordinates proposal and prospect communications.</li> </ul>	0-7

Adapted from AAM Marketing and Sales Roles

initial meetings with prospects, proposals, networking, or relationship-development events. Marketing activities help identify or generate possible opportunities, while sales professionals qualify and pursue those opportunities.

However, not all marketing and sales positions are created equally. Different position levels are accompanied by different experience and skills. Exhibit 1 provides some basic guidelines of common skills and experience one might expect with different position levels. A more thorough listing of skills and responsibilities can be found at the Association for Accounting Marketing website ([www.accountingmarketing.org/news/072311.asp](http://www.accountingmarketing.org/news/072311.asp)).

At this point, the firm should begin to identify what levels of support it requires. Many firms will find that the support they need crosses many areas. Yet, realistically, it is not possible for most firms to hire all of these positions. Therefore, a firm should consider developing roles with dual responsibilities. This has become extremely common today.

### Finding the right person

After a firm determines its support requirements, it must locate the right person to meet them. Depending on its recruiting bandwidth, it may opt to conduct a personal search or hire a recruiter. If the

firm chooses to perform its own search, it may find the following information useful for locating great marketing and sales talent:

- Association for Accounting Marketing;
- Legal Marketing Association;
- American Marketing Association;
- LinkedIn (look at groups or their job post function); and
- local universities.

Good technical skills are only one attribute that a potential employee should have. The employee will need to fit well into the firm, including working well with partners. The firm should begin by identifying the attributes it deems important to being successful in a particular position, such as:

- self-aware;
- organized;
- self-starter;
- good communicator (oral and written);
- independent;
- self-motivated; and
- good listener.

The interviewee should meet with multiple partners, the leadership team, and any other position with which he or she may be required to interact regularly (e.g., HR). If it is the first time the firm is hiring for this position, the firm should consider consulting with a well-respected marketer or a person who oversees marketing for a company with which the firm does business. Another option is turning to an outside consultant or hiring an outside marketing consultant solely for this purpose. Hiring the wrong person can derail a firm's efforts just as much as hiring someone prematurely.

### **Integrating a new marketing or sales professional**

Hiring the right person is only the first step. The work continues once they are hired. While some efforts at integrating a marketing or sales effort fail because firms hire before they are ready, many others fail due to integration challenges. For these positions to be successful, especially if they are new, there are a few suggested keys to success. The leader(s) responsible for managing the marketing and sales function in the firm should be prepared to:

- *Provide clear direction.* It is important for a firm to have a clear understanding of its growth goals, as well as the responsibilities of its new hire. If the firm is hiring a coordinator or less-experienced director, it should consider having a marketing plan in place before the employee comes on board. If it is hiring for a more senior-level position, the new employee may be experienced enough to help create the position.
- *Provide a point person.* Committee decisions are difficult and inefficient. It is far better to designate a partner-in-charge of marketing and sales. Having a point person does not mean others will not have the opportunity to provide input, but it does allow for more streamlined communication and more efficient decision-making

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between leadership and staff.

- *Empower professionals.* Most professionals, and employees overall, dislike being micro-managed. A firm should empower its professionals by giving them an opportunity to provide input, make decisions (appropriate to their position), and be creative. Marketing and sales professionals (or any professional) often produce the best results when they are given the opportunity to do what they know how to do best.
- *Support professionals.* Marketing often takes a backseat when the office gets busy. Or marketing professionals are often asked to get involved in activities that redirect them from growth-related activities. The tone needs to be set at the top. Firm leadership needs to be continually informed of these occurrences to keep staff on track to meet growth goals. Firm leaders need to make time for meetings, publicly show signs of support, and mediate if and when there are conflicts that might contradict the firm's priorities.
- *Hold professionals accountable.* Marketing and sales professionals should be held accountable for accomplishing what is expected of them. They should also be provided with regular feedback on their performance. Many of these professionals operate as a solo department. However, their development relies heavily on feedback about their success.

### **Expectations**

Firms should be realistic about expectations surrounding their new marketing/sales hire and know that success is not immediate. Finding and integrating the right person takes time. As a new hire integrates into the firm, there will be a large learning

curve for both the marketing/sales professional, as well as the leader(s) responsible for supervising the person. Leaders will be learning a great deal about marketing/sales processes, and the new professional will be learning about the partners, the firm, and the nuances of the profession.

When preparing to hire this new employee, the firm should set realistic expectations for the first and second year. If it is hiring a marketing professional, the firm should focus on key activities it wants accomplished in the first year. If it is hiring a sales professional, the firm should focus on sales activity and set a modest revenue goal. As it heads into the second year, the marketing/sales position should gain momentum and the firm can

begin to be more specific about expected results. Once the staff member is better assimilated into the position, he or she can become a true catalyst for firm growth.

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