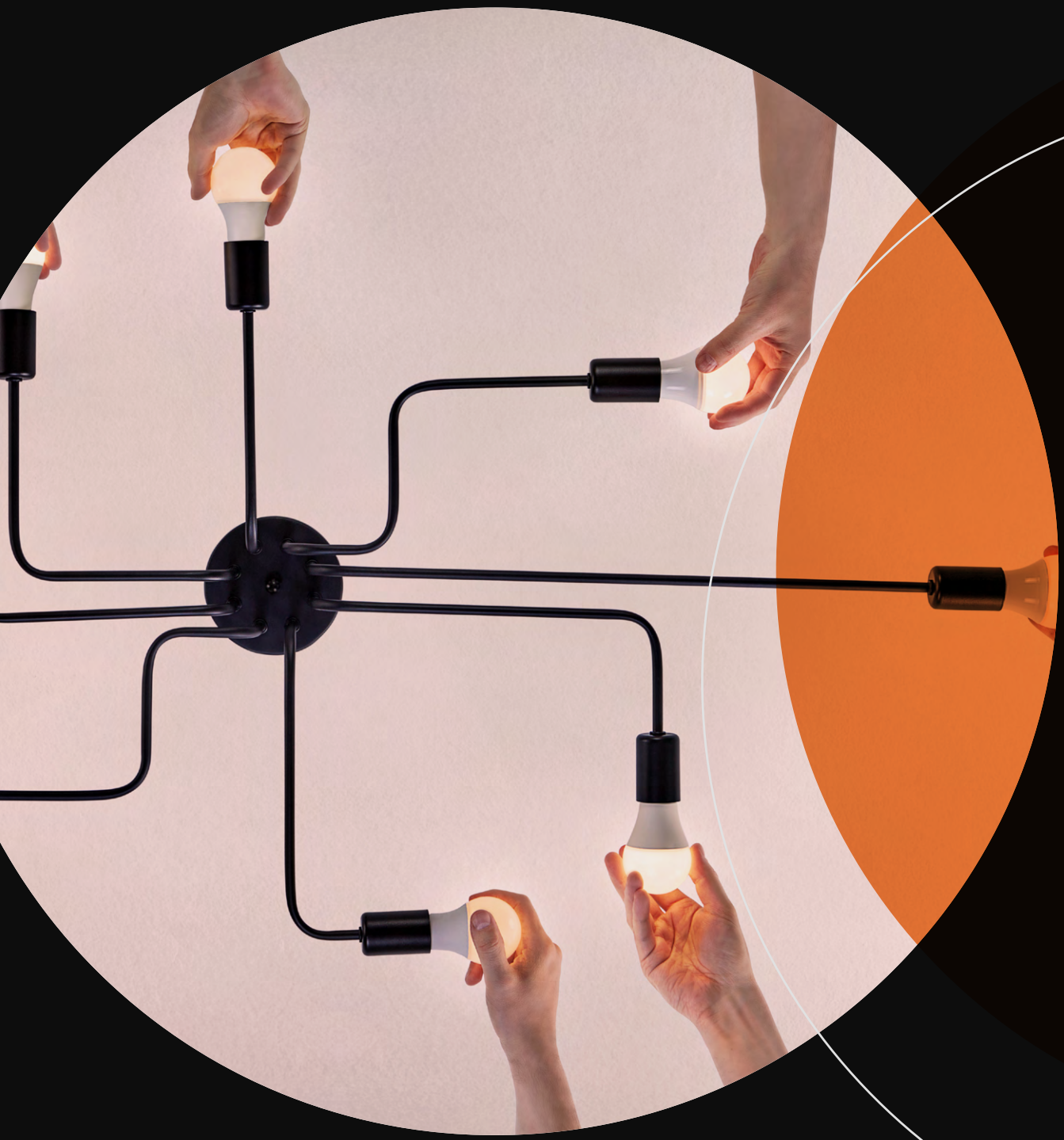
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How to be a great marketer in a partner-led organisation

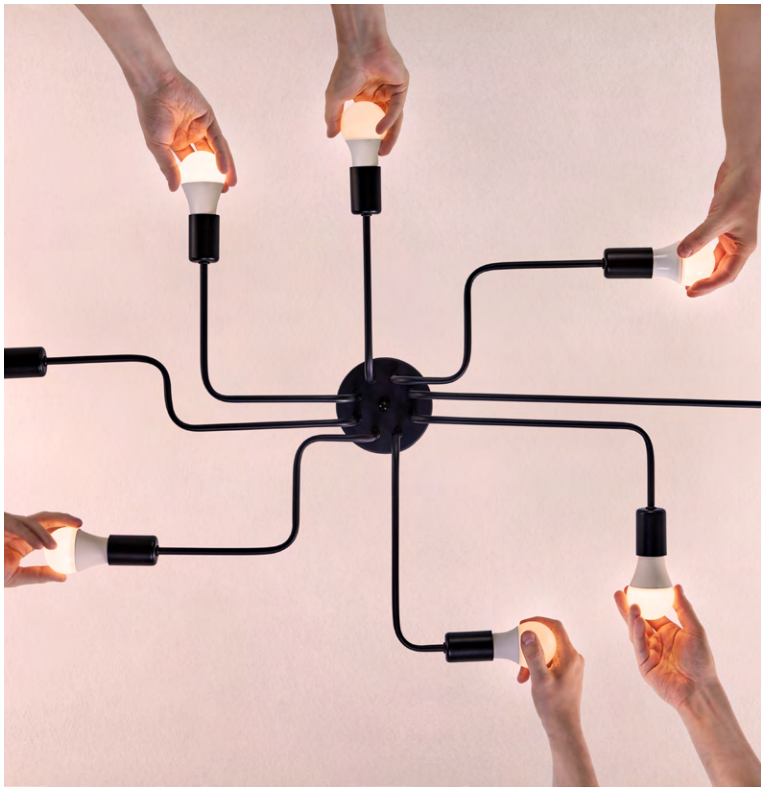


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Introduction

In a traditional corporate structure you might have just one or two bosses to satisfy.



In a partner-led organisation you could have hundreds – each with their own slightly different take on the wider company objectives and how they plan to deliver them.

In this environment, it's up to marketers to navigate this complex web – and to satisfy the partners' needs, client's demands and business' goals.

We spoke with senior marketers from a number of partner-led professional services organisations to find out:

- What's different about the role of marketing in a partner-centric business versus a traditional corporate?
- How to identify the partners you must work with to achieve your goals.
- The essential attributes and skills marketers need to succeed in a partner-led structure.

> *"I don't think there is a better time to be in professional services as a marketer. I don't think any modern partnership believes the old model – where a partner does the work, develops the business, manages the client relationship and promotes the firm all by themselves – is the best use of a partner's time. Partnerships are hungry to get support in place so the lawyers, accountants or architects can really focus on the things they do best"*
>
> **Alessandra Almeida Jones, head of marketing and communications, Baker McKenzie**

Section 1

What's different about marketing in a partnership?

In a partner-led business there'll be multiple stakeholders to convince, who'll be competing for your time and resources. Each of these partners acts almost as a mini-CEO, meaning you could have hundreds of senior executives to deal with at any one time.

Many partners may have competing priorities or objectives, so convincing them 'no man is an island' may be a challenge.

In most organisations, commands flow down from the top, yet even junior marketers in a partnership will often find themselves pitching ideas to a group of senior stakeholders above them. They know they'll need to work with their seniors to execute their ideas.

Partners are experts in their own subject areas, but they are often well-versed in marketing too. To become a partner you need to prove your ability to generate revenue by convincing clients to buy from you and buy into your ideas. While they might not have the technical marketing background and experience you possess, they'll understand what it takes to develop propositions and go to market.

The nature of the services many partnerships provide – such as professional/legal advice or consultancy – means having to react quickly to market, regulatory or political changes. This means marketing needs the same quick thinking, and must keep up-to-date with market developments.

The pace of this change can lead to a short-term outlook among some partners, so another marketing challenge is to convince them of the benefits of a long-term approach.

What do partners expect from marketing today?

A decade ago what partners wanted from marketing was pretty straightforward – events for clients, good pitches and strong award submissions. Marketing was very much a support service, reactively delivering on these requests. Today's expectations are much different.

Most partners recognise the wider benefits a professional marketing function can bring. Not least in freeing them up to focus on what they do best.

However, they'll need to see proof of the tangible value marketing is delivering to the organisation. Partners understand the need to demonstrate value – if they don't demonstrate it to their own clients, those customers will go elsewhere. So marketing's value must go beyond creating things that look nice or create fuzzy feelings, but link back to business objectives.

Data analytics has made the value of digital marketing far easier to express and measure against KPIs, which in turn has fostered more trust and respect from partners.

Julia Klein, marketing and communications director at Oliver Wyman, says consultants in her organisation are particularly keen on statements being backed by facts, and these analytics have been crucial in developing relationships between both parties.

Yet working hard in the background will not be enough. You need to be visible and ensure you are communicating your success with the partners and the

business. Marketers in partnerships often forget the need to market themselves, and tell their own story about the value they're generating for the business, to the partnership.

> *"You must eat your own dog food, or you will be a commodity and won't get any investment. You've got to really be clear on the positive impact you're having and control the narrative"*
>
> **Andy Woodfield, partner and chief marketing and sales officer, PwC**

These new expectations from partners are ultimately driven by higher expectations from their own clients. Customers now expect a relationship and experience, not just professional or legal advice. It's crucial that marketing understand this, as while they need to support their partners, ultimately they must cater to the customer.

> *"The expectation is for marketing to increase meaningful and profitable client contact. That manifests itself in all the different tactics, from events, broader campaigns, media relations, to social"*
>
> **Alessandra Almeida Jones, head of marketing and communications, Baker McKenzie**



How can you identify which partners to work with?

If you work in a multinational organisation, there could potentially be hundreds of partners for you to interact with. You're not going to convince every one to be an active partner – and nor should you try. Concentrate on developing a marketing mindset within your organisation, so that even if some partners are not engaging with the marketing team, they're still actively marketing the firm in the best way possible.

It may be frustrating not to be directly involved in a partners' efforts, especially if you're keen to elevate internal recognition of marketing, or haven't worked in a partnership before. Yet, your efforts here are highly valuable.

Internal communications will be crucial in engaging partners in marketing and business development. You'll already have some idea of the most receptive people as they'll be generating demand and asking for things from you. They should become your champions, cascading that mindset throughout the wider business. Much like trying to improve a Net Promoter Score, there'll be supporters, passives and detractors. You must focus on energising the supporters and converting the detractors.

One method of encouraging this mindset, employed at Oliver Wyman, is to utilise partners' highly-competitive instincts. The firm set up leaderboards – both at an individual and practice level – to score partners on metrics such as the numbers of clients at events, or who achieves the most press coverage. Gamifying engagement in this way has helped drive interest and motivation.

> *"We use partners' competitive streak to encourage them to try something innovative, support a certain initiative or invest in something long-term"*
>
> **Julia Klein, head of marketing and communications, Oliver Wyman**

Look out for the next generation

Alessandra Almeida Jones advises to keep an eye on who's coming up the partnership track in your firm, working with them at the stage of their career when they're keen to develop and sufficiently senior to understand the firm and its clients. At this point they are also likely to be less time pressured than senior partners.

In many partnerships there is a strong focus on coaching and mentoring associates, making them the go-to people when a partner needs to delegate. Building relationships with these individuals, and earning their buy-in will build a cadre of marketing-savvy supporters.

What if partners have competing objectives?

With so many stakeholders, competition for marketing resources becomes inevitable. There are two ways to tackle this scenario.

- Go back to the business objectives. Marketing should be aligned to the overall strategic business priorities, not just 'nice to have' side projects. Refocus on where marketing can have the most impact in achieving those objectives.

> *"We're a team of 120 but we can't do everything, we have to really prioritise our focus on achieving the business objectives"*
>
> **Bonnie Pelosi, marketing director, UK & I, EY**

- Bring a client perspective to the table. Many partner-led organisations are siloed by their offerings such as M&A or digital transformation consultancy. There can be tension between silos over who gets attention from marketing but from the customer's perspective, many of these services are all part of the same transactional cycle, and aren't seen as separate. Marketing has the a perspective of what the client is really looking for, and is well placed to determine which services they will truly value.

Collaborate for your clients

"Be really collaborative, don't be territorial," says Alessandra Almeida Jones. "The way partnerships are structured can sometimes lead to a siloed mindset, because each one can be a big profit centre. What makes a difference is to work with others, delivering in the way clients expect. It should be based on client demand, rather than just what the partners expect you to deliver. That's where innovation starts to come.

Key takeaways

1. The complexity of multiple stakeholders differentiates partnerships from traditional corporate structures. Invest time and resources in stakeholder mapping and analysis to understand who you need to interact with.

2. The days of a reactive marketing, there solely to meet partner demands are over. Come to the table with your own ideas and ensure you have metrics and KPIs that support them.

3. Build a marketing mindset rather than trying to engage every partner on an individual basis. Look for your champions – the well-respected, highly engaged partners who can help to cascade this mentality within the organisation.

Section 2

What attributes do marketers need to succeed in a partnership?

From a technical perspective, the marketing skills needed in a partnership are no different from any other corporate structure. However, there are a few that need extra attention given the complex network you're working in.

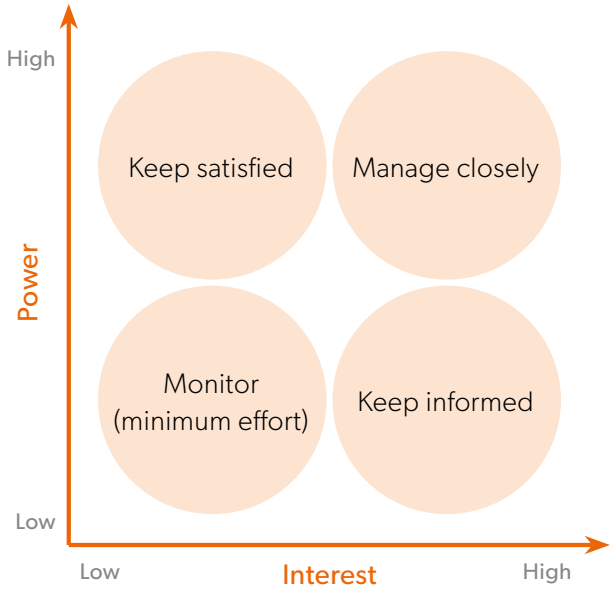
› Stakeholder management

By far the most important attribute for a marketer in a partner-led organisation is the ability to manage stakeholders collaboratively, respectfully but most of all effectively.

Spend time mapping out your stakeholder network, identifying the partners you need to know. Understanding the different styles and needs of those people.

A basic form of stakeholder analysis divides key individuals into one of four groups. Dividing the partners in your business in this way will help determine where best to focus your effort:

- **High power, interested:** This is the key group to engage with and keep satisfied.
- **High power, less interested:** These individuals need to be engaged, and influenced.
- **Low power, interested:** These people should be kept informed, as they can act as your allies.
- **Low power, less interested:** You should monitor this group to see if their interest increases. They can be kept informed with less frequent communication.



How to be a great marketer in a partner-led organisation © B2B Marketing

› Listening

The most sought after skill according to the senior marketers we spoke with is the ability to listen. This is how you'll truly understand the partners' needs.

Partners will approach marketing with a pain-point. It's the marketer's role to listen and uncover the real issue (which is often different to what's presented) and find an appropriate solution. According to Lucy Birch, marketing and brand director at PwC, this process is the starting point for a good marketing relationship.

> *"My advice would be to listen more. Really listening and making regular connections will make you much more able to develop a long-term relationship. You will see you have much more freedom to try new things and people listening to you in terms of long-term strategy"*
>
> **Julia Klein, head of marketing and communications, Oliver Wyman**

› Credibility

Partners are experts in their field. You'll need to show a similar level of expertise in your own field to establish respect from them. If both parties aren't seen as equals, it won't be effective – particularly as you won't be able to challenge them.

Building the required credibility needs a combination of attributes: Confidence in your own ability and the value you add, the ability to form a trusted relationship, an understanding of their day-to-day brand and business development challenges.

Partners are marketing's clients. You wouldn't visit a client without having done your research on them. Listen to them, speak to them in their language, without jargon, put things in a business context. Then back that up with insight.

> *"You might think the partner has all the answers with regards to marketing – but they don't. As professionals in our industry we should be providing that counsel on how to market. That comes from confidence and having a peer-to-peer dynamic"*
>
> **Bonnie Pelosi, marketing director UK&I, EY**



› Influencing skills

You won't be successful in a partnership if you don't have the ability to influence the multiple stakeholders and their varying needs. We've mentioned the relationship between the two parties should be on an equal footing, so you don't have the luxury of taking an authoritarian approach.

Everyone will have their own influencing style, but some of the ways to become a better influencer are:

1. Develop a rapport
2. Listen
3. Be curious, and ask questions
4. Watch their body language
5. Sell your argument
6. Relax
7. Invest time in the relationship.

> *"What you really need in a partnership is the ability to influence multiple stakeholders. The power dynamic is really based on influence rather than demand"*
>
> **Alessandra Almeida Jones, Baker McKenzie**

› Passion

As well as being experts at what they do, partners also tend to be passionate about their work. You need to match that level of enthusiasm for their work for the relationship to be a success, says Lucy Birch.

> *"Understand that relationships are key. When you first come in, learn how to navigate them. Stay on top of the skills you need to be an even better marketing professional. Have a learning mindset and bring that into the business – you need to take charge of your career and make things happen"*
>
> **Bonnie Pelosi, marketing director UK&I, EY**

How can leaders support junior marketers in a partnership?

Partners have a great deal of company and market insight that marketers can learn from. Here are some ways leaders can help junior members of the marketing team develop their skills.

- **Exposure:** Allow junior staff to get to know partners. Giving them face-time is important, but it's also about encouraging them to understand what their challenges and business issues are. Stakeholder mapping is a useful tool here – identifying the main people they need to know, and the different styles needed to communicate with them.

- **Quick wins:** Throwing a junior marketer in with a disgruntled partner is a recipe for disaster. It's not about treating them with kid gloves, but allowing junior employees to work with engaged and open-minded partners will enable them to learn the ropes and build confidence.

- **Take them out of their comfort zone:** They will need exposure to difficult situations – it's the only way to learn – so try not to shield them too heavily. Be there to offer support and advice.

- **Mentoring:** Everyone needs time to develop their own style when it comes to stakeholder management. Try to expose staff to as many as possible so they don't become fixed in the belief that on particular method is the only one that leads to success.

- **Let them fail:** Learning from bad experiences is a crucial development tool – just make sure the mistake in question isn't something that'll be terminal to their career prospects – or your own!

How best can marketing support partners?

According to our experts, there are two complementary roles marketing can play in supporting the work of partners.

› A role of an advisor

In a partnership environment, marketers might by shy in coming forward to either pitch ideas, or shoot them down. Don't be. The message from both partners and marketers is that they want to hear your suggestions and to be challenged on their own ideas.

Use your expertise to actively work through the partners' pain-points and provide solutions that will also meet the needs of their clients.

Partners don't want to work with 'yes men'. They want innovation and inspiration, including feedback on how things could be done better. But expect to be challenged in return; make sure you can back up your assertions with facts, experiences and data.

The key with any challenge is to focus on what the client – bring your suggestions back to that.

However, don't fall into the trap of becoming an adviser that doesn't act. Partners expect action, not just advice. They don't just want to be told something, they want to see you deliver it as well.

> *"While we are a support function, I want my team to be seen as partners to our partners"*
>
> **Julia Klein, head of marketing and communications, Oliver Wyman**

› A role as the voice of the customer

Marketing is in a fortunate position that it has oversight of the majority of client interactions across the business – something that partners in their functional siloes might not have access to.

Partners are naturally close with their own clients' needs and requirements, but won't necessarily be able to connect these with those of clients of other partners. Bringing all this insight together, and feeding back to the business, will support marketing's position as a trusted adviser.

Don't forget, partners are just like you

Ultimately, partners are human beings – so don't put them on a pedestal. They are rational individuals, who want the best for the business. Engage with them in the way you'd want to be engaged with – accounting for their own individual style, of course.

> *"Understand the business is important to me. There is a great sense of responsibility that comes from being a partner. If you ever want a partner to do something for you, the best emotion to push is that sense of responsibility. You can help me leave the firm in a better place than when I joined it – but I need you to be yourself and to challenge me if I'm being ridiculous"*
>
> **Andy Woodfield, partner and chief sales and marketing officer, PwC**

Key takeaways

1. The most important skill marketers need in a partner-led environment is stakeholder management. That means building a trusted and credible relationship through active listening.
2. Those at the start of their marketing careers may need mentoring and coaching to build up the confidence and credibility necessary to fulfil the role of trusted adviser.
3. Marketing has two main aims: to act as a key adviser, making suggestions and challenging partners' views; and to act as the voice of the customer, bringing together the disparate insights from clients across the business.

Section 3

Case study: How marketing adds value to partners at PwC

Andy Woodfield combines his role as chief sales and marketing officer, which he took in July, with his pre-existing role as a partner leading PwC's relationships with the UK Foreign and Commonwealth Office. Lucy Birch is marketing and brand director. They talked to Paul Snell about how to build a robust marketing and partner relationship in a multinational professional services firm.

What are the challenges for marketers working in a partner-centric environment?

Lucy: Sometimes it can feel like you're working with 900 CEOs. It's a very entrepreneurial mindset. You might look at a partnership and think that's a great big corporate beast. But it doesn't feel like that when you're dealing with 900 entrepreneurs, with their passions, demands, emotions and needs.

All the partners are really busy and often look to marketing with an immediate pain-point. You need a relationship that's trusted and credible enough to find out what's really driving that pain-point, and unpick it. That is the starting point for a good marketing relationship in a partnership.

Andy: People were surprised that I was appointed to my role, given that I wasn't previously a sales and marketing professional. But I reminded those individuals that every partner has to be a sales and marketing expert at some level. You don't survive as a partner if you can't make money… If you can't create opportunities to add value, and you won't create revenue.

Lucy: I think that's a great way to keep marketing on its toes about the value we bring. I know Andy is going to look me in the eye at the end of the year and ask me what value everything we've done has created?

Andy: If you don't deliver demonstrable value, you just won't exist. Marketing exists to provide a service, to enable the business to tell its story, to generate value in the market. If you're not telling your own story about how you're making that connection and how valuable you are, you're in trouble.

Where has the drive to prove marketing's value come from – was it marketing-led or demanded by partners?

Lucy: There is some pull from the business, but I think there is a really strong drive from within the marketing community. A marketing function that aims to be world-class should be driving that agenda.

Andy: Value is an emotional thing. If I don't 'feel' you're valuable, then I'll want more data about whether it is valuable. It's about the experience I get from working with a group of people, the story I hear, and the opportunity I have to get more value or have a better experience.

What's the best tone for marketers to strike with partners?

Lucy: It always starts with client needs. I could talk to 10 different partners, each with a different starting

point. The real skill of good marketers in professional services is being able to read their clients well enough, go in and build trust and rapport quickly.

Andy: We have quite a simple philosophy. First say yes, then listen really hard to work out what's really needed and what's possible. Ultimately value is a very personal thing to every single person. But if your starting point is 'yes', and are curious enough to explore, you can work out how you might add value, or not.

Lucy: An interesting thought is whether we are marketers anymore, or part of an internal consultancy about how to grow your business?

Should marketing be an advisory role for partners?

Andy: That's a trap. I don't want advice on all of my options. I want to know how we deliver against an objective.

Lucy: I think that's dangerous too. There will be times when partners don't quite know what problem they're trying to solve, and I would explore and collaborate, but I'm 'doing', because I'm clear I need to achieve an outcome.

Andy: It's incredible difficult for internal marketing to demonstrate value if it's just advising. It has to grab the hand of the business and go on the journey together. That's how you demonstrate value to partners.

Andy, how have you seen the relationship between marketing and partners change?

Andy: There was a time when the only people who got marketing support were those who ran business units, industry groups, or the board. Today, it's not just an exclusive service for board members (which in many organisations it still is) but resources still tend to be deployed at a leadership level. One reason I wanted to keep my consulting partner role was to make sure the teams I work with are feeling the value from sales and marketing.

Lucy: When it works best there is genuine collaboration, shared objectives, passion and commitment. There is a co-dependency that has to be based on mutual respect.

With so many partners, how can you maintain oversight of who needs marketing support?

Lucy: We're aligned behind the overall firm's strategy in terms of priorities. Marketers are expected to know that, its challenges, and where it wants to go commercially.

From a marketing perspective, our business partners are the eyes and ears and so marketing should always be engaging with them.

Andy: Managing the ongoing career development of our marketing community is really important, but so is ensuring people are focused on our key client areas – lines of service, regions, industries, etc – and that we manage the relationships with key stakeholders.

I think one of the traps some marketing functions fall into is being either very heavily invested in client relationships, or pure marketing capability. It's really important to have both, and to make sure they can't breathe without the other. If one doesn't have a resource, the other doesn't have a channel to market.



Finding your perfect partner

It takes two to tango. Follow our dance card to find out how to put together an award-winning marketer-partner routine



1 Choose carefully

Map your stakeholders, identifying which are the most engaged and find those that'll form the best partnership.



2 Listen to your partner

Take the time to understand their needs, and find out what's really behind their pain-points.



3 Build a rapport

Invest time in the relationship, build a rapport – this will all help your ability to influence them.



4 Strive for success

Constantly challenge and re-evaluate how the relationship can evolve and work better. Don't be afraid to challenge each other's ideas.

5 Be the voice of their customer

Marketing brings an overview of the business plus insights and feedback from customers across the business – shout about that.





6 Take a bow

Go through the performance metrics and KPIs with your partners. Don't forget to communicate your success and the value marketing brings to the wider business.

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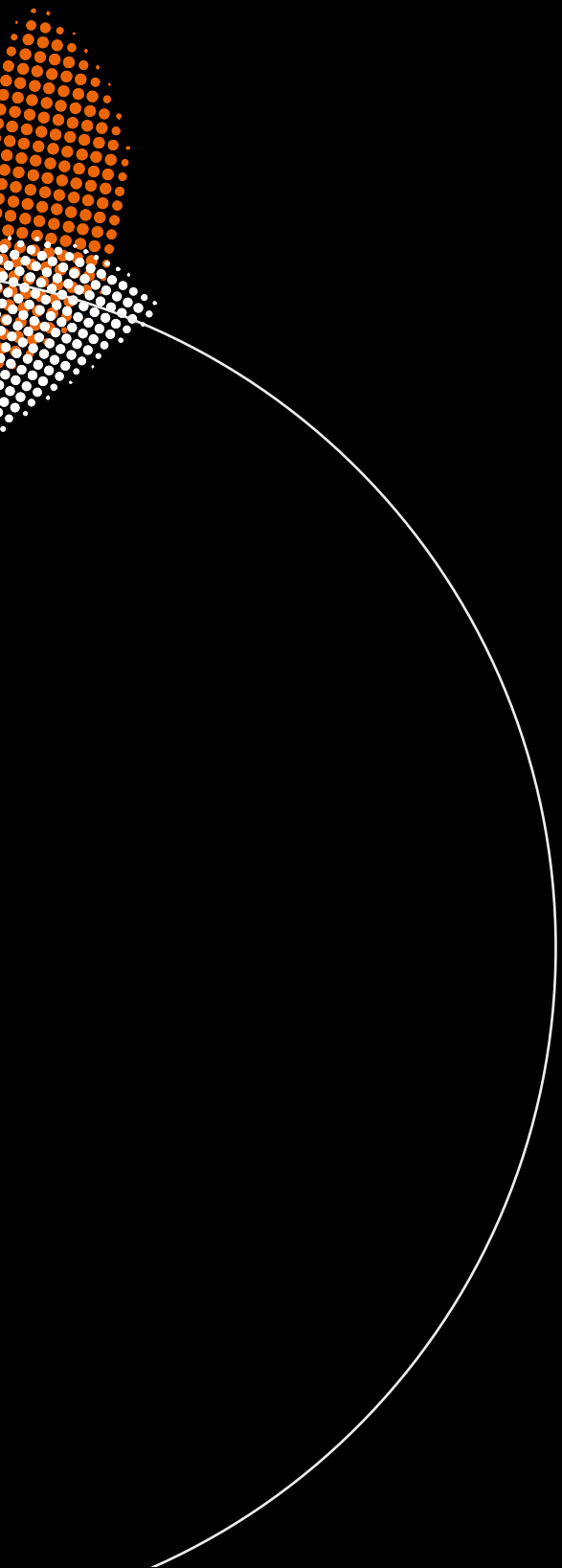
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