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The key challenges facing professional services marketers into 2025

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Lina Vaz,
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Professional services present unique challenges that set them apart from product-based industries. From abstract offerings to lengthy sales cycles and intense competition, marketers in this field must work hard to build trust and demonstrate expertise. I spoke with Teresa Poggenpohl, *Senior Vice President and CMO,* **Unisys** and with Matthew Allen, *BD & Marketing Director,* **Bidwells**, to explore the biggest challenges and innovative strategies reshaping professional services marketing.

Strategic Demand Generation

One of the most pressing challenges in professional services marketing is generating demand within strict financial constraints. Boards often focus on measurable outcomes, and so approving large budgets can be a difficult thing to achieve. The result is that professional services marketers have to be highly efficient, and as strategic as possible when it comes to their demand generation work.

"Digital is the backbone of our engagement strategy. It really allows us to identify our target audience and literally direct things to them which is highly efficient", **Teresa** explained. Her team focuses on identifying key audiences and engaging them directly through digital channels. Even physical advertising placements, such as those in airports, are chosen based on their relevance to client demographics.

Reducing friction in online experiences has also proven crucial. Streamlined landing pages tailored to specific campaigns, coupled with innovative tools like chatbots, have driven improved results when it comes to lead generation. *"I was skeptical about chatbots for B2B,"* she admitted, *"but they've become a valuable tool for converting interest into actionable leads."*

In terms of demand generation, **Matthew** tends to focus on the leading indicators for the market, how it's going to evolve and what's really driving the business. *"We try to position ourselves in a more informed position than our competitors"*.



Teresa Poggenpohl,
Senior Vice President and CMO,
Unisys



Matthew Allen,
BD & Marketing Director,
Bidwells

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The importance of differentiation

Differentiation is critical in a crowded marketplace, especially for global professional services companies. Achieving this requires a strong and consistent brand identity that resonates across cultures and geographies.

In order to do this, Bidwells has created the Oxford Cambridge Supercluster Board, which is a joint venture between world-class universities in the UK such as Oxford and Cambridge, industry leaders and investors.

They are creating play spaces for innovation to happen: *"leading people within our client organizations are saying: 'how can I get more involved in what you're doing?' It's creating a demand to be involved and a unique relationship between Bidwells and its client groups by giving them something that no one else can give them."*

In a few weeks, they will be launching a piece of research through this Supercluster Board with the Secretary of State at the government offices, with Bidwells able to bring their clients along. This is a unique differentiator, and has established Bidwells as unique market leaders in the science technology space.

In Unisys' case, **Teresa** approached the challenge by spearheading a comprehensive rebranding initiative to modernize the company's image. *"Our core brand was created in 1986 — it didn't align with our current solutions,"* she explained. The rebranding effort covered not just visuals, but also the verbal essence of the brand.

"Your brand is what you stand for verbally in the marketplace," she emphasized, noting that their new tagline — Experience Breakthroughs — encapsulates the company's promise to deliver transformative results. By involving leadership throughout the process, the rebranding gained widespread internal support, ensuring its success.



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Navigating Complex Client Journeys

Professional services often involve complex sales cycles with multiple stakeholders, requiring a highly personalized approach. This can be resource-intensive, but **Teresa** says Account-Based Marketing (ABM) campaigns and AI tools are making personalization scalable.

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"We've done a lot of piloting this year, which has allowed us to refine the concept and get it right. Now, we're at a critical point where we're ready to scale all our activities. ABM allows us to expand our share of wallet and win big deals with key accounts, scaling is the next step. For example, when we analyzed the potential of implementing ABM for 50% of our clients, the projected uplift was significant. The opportunities and pipeline that can be unlocked through these one-to-one activities are quite substantial."

She explained that AI has revolutionized these efforts by enabling quick, accurate translations and content customizations for specific markets. For example campaigns tailored for Brazilian Portuguese have delivered remarkable engagement. *"AI tools have been a game-changer,"* she stressed.

By leveraging intent data, her team identifies prospects actively exploring relevant topics, enabling a timely and tailored outreach. This proactive approach not only improves client engagement, but also enhances overall campaign efficiency.

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Bidwells, meanwhile, has restructured the marketing and business development operations, creating a client experience team with the purpose of becoming the voice of the client in the business. This move was aligned with the move to HubSpot as a CRM, which is being fed with information from client meetings to ensure they have access to the right data and insights about each key account:

"A lot of our advisers are incredibly brilliant at what they do, but often they focus on delivering a particular service. And it's important to consider the client's real needs beyond that. What are the client's goals? What are the wider needs of that business? Do we really understand their strategy? Do we understand their vision? Do we have the right relationships across those teams to make sure that we're giving the client exactly what they need, rather than giving the client what we think they need?"

Matthew adds that it's important to ensure the right information is being circulated within the business. This has been a real transition to Bidwells, which is taking a much more considered approach to their client relationships.



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Measuring ROI and Marketing Accountability

Demonstrating ROI in professional services marketing can be an incredibly complicated affair, due to extended sales cycles and the nuanced nature of the services provided. However, that doesn't mean it's not important. For **Teresa**, aligning marketing goals with those of the commercial team has been essential.

"We started reporting our entire lead portfolio every other week. This includes leads that we generate independently, which we refer to as marketing-originated leads. These reports are shared with the commercial organization, as well as the CEO and COO, ensuring full transparency. This process also allows us to monitor lead flow, including how it progresses in Europe."

This has fostered a collaborative approach to improving lead quality. The introduction of *"VIP leads"* has further refined this process. *"It's about delivering quality over quantity,"* she explained, and within a day they know exactly who is moving forward with each lead. She also emphasizes the importance of following leads through to their ultimate conversion or loss. *"Sometimes, marketers stop at the marketing-qualified lead (MQL) and consider their job done. They hand it off to sales, and then whatever happens, happens. In some marketing circles, that's just how people think. But I'm a curious person. I asked my team: 'Don't you wonder what happened to that lead? Chase it to the end. If there are no wins at the other end, then we need to re-evaluate what we're doing."*

The point is to delve deeper into the quality of the leads and adjust the marketing strategy to achieve the best results. Her team has tripled the win rates of the deals they've brought to the table in just 18 months.

Harnessing Data and Predictive Insights

Data analytics and predictive insights play an increasingly central role in professional services marketing. However, fragmented data systems can hinder their effectiveness. **Teresa's** team has invested in a Customer Data Platform (CDP) to consolidate information and automate reporting.

"We're looking forward to being able to calibrate our marketing spend in near real-time by 2025 and optimize it dynamically, even for our programmatic spend. We've been positioning ourselves throughout the year to achieve this, and I believe we'll be ready by January.

Our goal is to transition to a process that is almost fully automated. Adding AI will make us significantly more impactful."

This shift allows her team to focus on strategic insights rather than manual data processing, driving better decision-making across the organization.

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Driving Digital Transformation with AI

Large professional services businesses often struggle to make their marketing and wider operations as effective and efficient as possible. Although this challenge has been around for decades, AI does now provide an opportunity to make real progress.

For **Teresa**: *"Marketing has always relied on tools. As professionals, it's essential to lean in, adopt, use and engage with these tools to stay relevant. We regularly share and celebrate successes to encourage those who may not be as quick to embrace change to jump on the bandwagon."*

In Bidwells' case, they have truly been at the forefront of this AI revolution, having appointed Ben Lee as Head of Digital Transformation to lead the way. According to **Matthew**, this AI approach has created huge efficiencies in their marketing processes, and helped drive forward their digital transformation."

"That approach evolved, and it became pretty obvious that we needed to apply this not just in marketing but across every aspect of our business. As part of our shift toward driving digital transformation, Ben transitioned from a marketing role into a broader position where he's now responsible for data and AI across the entire firm."

Gathering information about Bidwells' market performance once took weeks or months, relying on input from multiple stakeholders. Now, however, the business is able to act in a much more efficient and timely manner, using accurate, relevant data to evolve the business strategy appropriately.

Bidwells can now quickly analyze past projects, understanding their scope, impact and market reach with the click of a button, streamlining credibility and communication as a professional services firm. This new system democratizes access to the company's collective knowledge, allowing employees to use it effectively during client interactions.



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Balancing Innovation with Regulatory Compliance

Operating in a heavily regulated global market adds another layer of complexity to professional services marketing. From data privacy to accessibility standards, compliance is non-negotiable.

"We take all regulatory standards very seriously and optimize based on the strictest ones, often from Europe. We work closely with our IT organization and our legal teams to ensure adherence to all standards. Compliance is something we take very seriously, and we stay on top of any changes in regulations."

Teresa stressed the importance of maintaining trust. Even minor lapses in compliance can erode a brand's credibility, making vigilance essential.

The Future of Professional Services Marketing

Marketing professional services requires a delicate balance of innovation, precision and collaboration. Whether it's embracing AI to scale personalization to drive lead generation and deliver a great customer experience or modernizing brand identity to stand out globally, marketers must remain agile to navigate all the challenges.

Both Teresa and Matthew's insights offer a roadmap for overcoming the complexities of professional services marketing and achieving sustainable growth in an increasingly competitive environment. This dynamic sector demands strategies as innovative as the industries it serves, ensuring professional services marketing continues to evolve and thrive.



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