

Marketing Leadership Initiatives: Smythe Associates

- **Revitalized branding and communications.**

Communications programs were outdated, content-deficient, and failed to communicate firm's value proposition or differentiators. Brand was unclear and visual identity chaotic.

Created project objectives: *simplicity—clarity—identity—image*. Built internal coalition of support and launched a comprehensive overhaul beginning with interviews with key stakeholders.

Implemented new promise line and directed redesign of entire visual identity. Led road show to introduce new identity in all 15 offices. Accelerated timetable to 7 months to coincide with 30th anniversary celebration.

Bottom Line:

- New website awarded “National Top 5” ranking for regional firms by Professional Services Monitor.
- Newsletter became a powerful lead generator, averaging 5 leads per issue on featured services.
- Tag line became litmus test for communications, proposals, client reports, staff evaluations, and hiring profiles.
- New image helped facilitate merger that resulted in successful expansion into New Jersey and the addition of critical expertise and leadership resources.
- Firm was positioned as a major regional force on par with national employers in its industry, attracting both experienced recruits and new college grads.

- **Ignited business development.**

Growth had stalled in mature markets and awareness was low in regions targeted for expansion. Business development was unfocused and partners/managers (primary drivers of new business) lacked confidence in consultative selling.

Designed strategy to improve lead development and consultative selling skills of partners and managers. Set aggressive goal to earn 100% ROI on campaign cost within 12 months.

Bottom Line:

- Produced more than \$60K in ongoing new annuity and project revenue in just 3 months, realizing a 300% ROI.
- Added 150 new self-identified “interested” prospects to database in a single test market.
- Program won the top national award from the Association of Accounting Marketing.

- **Drove successful customer relationship management (CRM) initiative.**

Information systems for the firm's most valuable assets (clients, prospects, referral sources, alumni, staff capabilities and experience) were outdated, fragmented, unreliable, and unconnected to the financial system. There was no ability to track a client's total value to the firm or identify cross-sell opportunities.

The impact was wasted money, poor response times, duplication of efforts, and missed opportunities.

Initiated, developed, and sold partners on a major \$350K CRM initiative (software, hardware, implementation, training, and ongoing database management). Established project goals and benchmarks. Created internal champions by recruiting an Advisory Committee of influential partners and staff. Selected vendors. Recruited and coached project manager and cross-functional project team.

Bottom Line:

- Captured immediate savings of \$15K on production and mailing costs; return rate dropped from 10% to less than 2%.
- Enhanced reputation as trusted source of timely knowledge to clients.
- Gained ability to evaluate profitability by client, line of business, service, and geography, creating benchmarks for marketing performance and targets for growth.