

6.13 The Chief Marketing Officer: An Evolutionary Role

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What You Will Learn in This Chapter

- Reasons for the emergence of the Chief Marketing Office in A/E/C firms.
- Definition of responsibilities for the CMO role.
- Challenges facing the CMO in professional service firms.
- Evolution of diverse, multiple marketing roles.
- Scope of responsibilities for senior marketing positions.

Introduction

Today's firms are taking a fresh look at their marketing organizations, as well as at the diverse range of roles that have developed to meet the needs of contemporary practice platforms in the rapidly changing global economy. The emergence of the role of the Chief Marketing Officer (CMO) in professional service firms has spurred discussion about the scope of responsibilities for the position, the profile of firms that will truly integrate marketing as an executive function, and the potential obstacles to success for the individual and the firm. This re-evaluation of marketing roles presents an opportunity for individual marketers to reflect on their career trajectories and chart their own futures with greater clarity, based on market demand and their personal ambition and skills.

Evolution

No corporate function has evolved more dramatically than marketing. Once a fairly discrete department within the organization, marketing is more and more often being asked to fulfill a far more significant, strategic role with implications for the entire enterprise. Indeed, a number of chief marketing officers (CMOs) have flourished in their new capacity as "Growth Champions," a term we use to describe marketing's engagement in leading companies to expand their reach in the consumer or business-to-business marketplace. — "The New Complete Marketer," Gregor Harter, Edward Landry, and Andrew Tipping, *strategy+business* issue 46, Autumn 2007

When SMPS *Marketer* first launched a discussion of the CMO role in its February 2005 edition, there were only four members carrying Chief Marketing Officer titles. In the summer of 2008, the membership directory listed 21 marketers with CMO on their cards (although there are no doubt many more who fulfill the role but with a different title). While hardly an overnight sensation, the increased frequency of the title in professional services firms suggests that there is a growing recognition of the need for executive level leadership and expertise within the marketing function among member firms.

Some of the reasons for this change parallel those of other businesses: globalization, the fragmentation of markets, the decline in effectiveness of traditional marketing methods, and the rise of new media. Others are more specific to firms practicing in the built environment. Clients have modified their expectations of the professional service provider to accommodate radical shifts in their markets and to position against or take advantage of the increasing commoditization of design and delivery services. Concurrently, firms are facing more diverse competition for projects and erosion in the value of expertise; firms that were recognized for market leadership may now see themselves consulting to "market-busters," who

bring a different type of value to the professional service equation. Firms must respond to these challenges by capitalizing on their ability to create profitable service offerings or by repositioning themselves through innovative value propositions.

With the growing need for increased sophistication in marketing strategy, there is also increased confidence in the ability of professional service marketers to contribute at the executive level, which is a direct result of the professionalization of marketing organizations and individuals. The expanded availability and sophistication of training, the maturation of the accreditation program, and the development of other educational opportunities through the Society for Marketing Professional Services and affiliated professional organizations, such as the American Institute of Architects (AIA) and the American Council of Engineering Companies (ACEC), has produced a remarkable talent pool of senior marketing professionals.

With the serious and increasing demand for marketing leadership on one hand, and significant numbers of talented, experienced senior marketers on the other, the day of the professional services CMO should be here. Yet many of our finest firms, which have evolved from small teams with hands-on partners and a tacit understanding of the firm's goals, still struggle with the challenges of leadership, and there may be reluctance to invite marketing to the C-class table with the CEO, CFO, COO, and others. In part, the culture of professional services firms originated with leaders who are most often technically trained (engineers, architects, contractors), not MBAs who are expert in management of complex corporate organizations.

While successful 21st-century professional firm executives have proven to be savvy competitors in a dynamic global market, there is often a lack of clarity about the very definition of marketing and the roles and responsibilities of those in the marketing department. In the 1970s, when Weld Coxe wrote his seminal book, *Marketing Architectural and Engineering Services*, he defined several roles that have guided marketing departments for an entire generation. While many of the responsibilities he addressed at that time have continued to be important, other roles have evolved, often personified and then codified by a leader in the profession. Today, however, the profession is confronted by a fresh set of questions that will define marketing roles going forward:

- How will you anticipate and address the needs of clients who are demanding progressively customized goods and services?
- How will you work with your collaborators, key firm leaders, and consultants to craft value propositions that will set you apart from your competitors?
- How will you create integrated communications strategies that simultaneously build your brand and address issues related to your clients and markets?
- How can you create alignment between the marketing agenda and the top issues of your firm's leaders?
- How can you develop incentives for the "next generation" to create opportunities that will lead to sustainability of your practice?
- How can you really measure marketing ROI?

Firms with these questions on their strategic agenda are most likely to recognize the importance of having a Chief Marketing Officer on the leadership team.

Defining the role

Once an organization sees the value of having a single individual responsible for directing all of the firm's business development, client care, and promotional activities and for developing an organizational structure to support those activities, there are still questions to be answered. Although there's no "one-size-fits-all" job description for the CMO, there are a number of shared attributes among those CMO pioneers in professional service firms.

In his article “The Rise of the Chief Marketing Officer” (SMPS *Marketer* February 2005), Jerry Yudelson identified what he called “determinants of success in the CMO role,” including:

- A clear mission and responsibilities
- A clear fit with the marketing culture and structure of the firm
- A compatibility with the CEO
- A team player who can play a supporting role for the firm’s stars
- A personality match with the level of responsibilities and expectations set by the firm
- An ability to make line managers “marketing heroes”
- An ability to have some control over the marketing of the line organization, which might include, for example, direct or indirect supervision of the marketing managers at branch offices
- Right- and left-brained skills, creativity, and analytical talent and the experience to use them in appropriate ways to advance the firm’s strategic agenda.

The overarching themes articulated by Harter, Landry, and Tipping in “The Complete Marketer” provide a balance to the specificity of Yudelson’s list. Based on research and interviews with CMOs from top marketing organizations worldwide such as American Express and Proctor & Gamble, the authors identified characteristics they believe represent the leading edge of the marketing profession. They observe that the best CMOs:

- Put the consumer at the heart of marketing
- Make marketing accountable
- Embrace the challenges of new media
- Remain adaptable

If that sounds like marketing common sense, as the authors point out, “There’s a world of difference between knowing and doing.”

Another differentiating aspect of the CMO role is its positioning within the firm. The CMO is not only part of senior management, but is also responsible for the leadership necessary for alignment of the firm’s vision with its marketing goals. This places the marketer at the center of the firm’s strategy and practice agendas, acting not just as a ringmaster but as a driver of growth.

As a principal author of the firm’s value proposition, the CMO understands the vision, ambition, and capabilities of the organization, and how those assets can be deployed best in an increasingly complex, competitive environment. The CMO mindset allows the marketer to recognize currents of change, not only in the market but also in the culture, and to use that understanding to position the firm for the future. In the search for competitive advantage, the CMO takes a long-term perspective on opportunity, seeking success in today’s marketplace and sustainability for the firm over time.

As we look across the professional services industry, we recognize that there are marketers who function as CMOs in their firms without the title, position, or benefits. There are also CMOs who are more focused on winning the project here and now, instead of developing real distinctiveness for the future. And there are firm leaders who are still waiting for the “person who can harness our potential and take it to the next level.”

Challenges for the CMO

Achieving executive marketing status certainly has its rewards. However, as Gail McGovern and John A. Quelch point out in “The Fall and Rise of the CMO” (*strategy+business Special Report #04406*) “the track record of CMOs, so far, is mixed.” Among the 120 companies they surveyed, they reported short tenures and high churn rates, for five main reasons:

- Too little empowerment
- Too high expectations
- Too uncertain a need
- Too much showmanship
- Too little experience

The first three issues highlight the difficulty that organizations have in creating an environment of success for the CMO. Whether the problem is that a Chief Executive Officer (CEO) won't relinquish control of marketing decisions, that the executive leadership doesn't allow the CMO enough time to deliver results, or that there is lack of firmwide agreement about the need for and responsibilities of the CMO – the executive marketer will have little room to prove his or her value. It is critical that the firm has broad management consensus about the importance and expectations of the CMO, and that senior marketers considering the tempting CMO title have a clear understanding of the executive leadership's vision for the firm as well as goals and metrics to measure success in the position.

The last two issues identified by McGovern and Quelch focus on the ability of the CMO to deliver on those expectations. It is not surprising that some senior marketers, having risen to the top of the profession by excelling at high-profile business development or sales positions, might struggle in the role of cheerleader-in-chief for others in the organization or might find themselves at odds with a CEO or other senior execs who fail to give credit to the CMO for earned success.

The CMO has responsibility for enhancing the firm's *overall* position in the marketplace, but may face a challenge when navigating the complexity of the market-focused practice model that is prevalent in larger professional services firms. In this model, a firm often leverages subject-matter expertise through distinct practice groups, and the "cult of expertise" may be allowed to trump cross-practice market assessment and client development strategies. To resolve this issue, the CMO will need to negotiate with practice group leaders to encourage collaboration and synergy across market sectors or customer segments and will need the support of executive leadership to do it successfully.

The CMO Institute, a non-profit industry association, has published articles and other studies explaining the role of the CMO as it has evolved. With expanded responsibility for areas such as sales management, public relations, marketing communications (including advertising and promotions), market research, and customer service, even the most experienced marketers are faced with managing a diverse range of specialized disciplines in which they must be knowledgeable, but may not be expert. Their challenge is compounded by the fact that the day-to-day activities of these functions, which range from the highly analytical (e.g., pricing and market research) to highly creative (e.g., advertising and promotions), are carried out by subordinates possessing learning and cognitive styles to which the CMO must adapt his or her own leadership style.

Moreover, the CMO is invariably reliant upon resources beyond his or her direct control. The priorities and/or resources of functional areas outside of marketing such as production, information technology, legal, and finance have a direct impact on the achievement of marketing objectives. As result, CMOs, more than any other senior executive, must *influence* peers in order to achieve their own goals.

Marketing roles in context

There are three basic job descriptions found in the appendices to Coxe's *Marketing Architectural and Engineering Services – Marketing Director/Manager, Marketing Coordinator, and Lead Finder*. Thirty years later, these three roles have splintered into dozens of titles that reflect increasing sophistication in the marketing of professional services. True, certain of the titles on our business cards are synonyms or, in some cases, disguises meant to appease management, the marketer, or the potential client. Is the *Client Relations Manager* really a lead finder? Or is the newly promoted *Marketing Manager* still a proposal writer 95 percent of the time?

With all the "job titles of the future" labeling going on, there are, in fact, new roles that have developed in response to the changing environment for professional practice. Other roles have expanded to encompass new responsibilities in changing organizations. There is no single or simple solution in the search for a fit between the marketing needs of a firm and the talents and ambition of the marketer. However, the maturation of the profession and the diversity of firm models has created the opportunity for everyone to find a role in which they can excel – if they are honest about what they can and want to do, as well as what the firm needs in a marketer.

Although the profession has evolved, there are firms whose marketing requirements are readily met with a *marketing coordinator* or *marketing manager*. These firms are most often general practices of local or regional scope, where the principal or principals have hands-on involvement in marketing and business development efforts and need solid support to stay responsive. The primary focus for the marketer is necessarily near-term project pursuit, with community-based outreach to clients and collaborators.

However, when every *closer/door* in the firm has the potential to create customized marketing materials, and every computer can store information on clients and projects that ought to be shared, the ability of the *manager* or *coordinator* to instill

confidence and encourage collaboration is more vital than ever. Add in the new demand for web site management and the availability of better reconnaissance for all opportunities, and you have a role of increasing depth and value.

For other firms, the challenge is not so much response, but image. This is especially true for firms that are led by a singular talent, where the firm's claim to market share is based on the fame of an individual. In the age of the "starchitect," it is easy to assume that these celebrity designers have simply been discovered. More often, they have consciously positioned themselves with the help of publicists and advocates who function as talent agents.

The role of *talent agent* is well understood in the entertainment industry — their job is to find the right vehicle for the "talent." A *New Yorker* article, "Secret Agent Man," described one of Hollywood's top agents who "is constantly on the lookout for ways to bring his clients together and extend their reach into new fields."

That is exactly the thinking we have observed among an emergent group of marketers. Their title may be *business development*, but their activity moves them well beyond lead-finding. These talent agents are scouting for new relationships and innovative alliances that will not only showcase specific talent within the firm, but connect their "clients" into the broadest cultural, social, and economic contexts — and in so doing, position them for the next wave of creative opportunity.

Talent agents are frequently assisted by *public relations specialists*, whose charge is to make certain that the "client" is featured regularly and prominently not only on the pages of trade journals like *Architectural Record*, *Building Design & Construction*, *ENR*, or *Interior Design*, but in the *New York Times* or *Wall Street Journal* as well as publications of broader interest like *Travel & Leisure*, *Vanity Fair*, and *Wired* — an effort that links the firm to broader cultural and social issues and extends its impact. The *Public Relations Specialist*, whether the role is internal or consulting to the firm, takes an active role in the establishment of relationships with the media and with the development of content — the articulation of the concepts that define the practice and its interests.

Traditional lead-finding remains a critical function for many practices, especially larger firms with a need for a high volume of projects. While the "golden Rolodex" has morphed into the "platinum PDA," the experienced *business development broker* offers the firm access to their networks, helping the principals and project leaders to build relationships and set the stage for opportunity.

The pejorative "bird dog" may have disappeared from modern marketing's vocabulary, yet the role of the business developer is still misunderstood by many organizations. The best *directors of business development* are independent spirits with egos as strong as their relationship-building skills; the networks they develop will always belong first to them personally and then to others in the firm. These individuals are most effective when they can leverage the firm's capabilities and brand identity in the marketplace of clients, rather than focusing on internal management issues that they are often "promoted" to do.

The growing requirement for and availability of sophisticated information on projects, clients, and markets has created a place for skilled *market research specialists*. While these marketers often build strong networks among their resources, their first concern is the gathering of high-quality information that will give the firm a competitive edge. In today's markets, these savvy researchers are tracking everything from investment patterns and demographics to content-building background on trends in education or bio-medical research.

With the coming of age of our profession, we now have an executive position, the CMO, which is gaining wide acceptance among leaders across the disciplines. There are also emergent specialist roles that offer powerful new opportunities for individuals and firms that are looking for an alternative to the traditional marketing approach. The challenge is to know ourselves — our talents and our passions — well enough to seek the right opportunity and choose the role that will bring the greatest value to our firms and to ourselves.

Conclusion

Every business, regardless of size, has the opportunity to leverage its value systems and core competencies to achieve success and sustainability. In an expanding economy, our firms have grown and prospered as a result of opportunity, concentration, optimization, and lots of hard work. But as times change, we must develop an approach to strategy that links our practices to an intricate network of collaboration and resources, connecting the content of the work that we do with the clients for whom we do the work, as well as the economic environments in which it occurs.

Few senior-executive positions will be subject to as much change over the next few years as that of the chief marketing officer...what's actually required is a broadening of the CMO's role. This expansion will encompass both a redefinition of the way the marketing function performs its critical tasks and the CMO's assumption of a larger role as the "voice of the customer" across the company as it responds to significant changes in the marketplace. – "The Evolving Role of the CMO," David Court, *The McKinsey Quarterly* 2007 Number 3.

The Chief Marketing Officer should not only create the marketing organization of the future, but also assume a more significant leadership role as a driver of growth that is responsive to the marketplace within the context of the goals and aspirations of the professional services firm.

	Marketing Resource Provider	Closer/Doer	Market Sector Leader
Constituency	The leaders of the firm involved in marketing and business development	The firm and its clients	The firm and its clients within defined boundaries (market sectors or customer segments)
Agenda	Support the efforts of key practice leaders to target potential clients, build relationships and secure new commissions.	Serve as ambassador and client advocate, while building relationships and securing new and repeat business.	Leverage opportunities for a specific practice area to achieve strategic goals (i.e., capture market share, create distinctiveness, build brand)
Activities : Vision and Strategy	Participate in development of marketing plans in accordance with business goals established by firm leadership. Work with key practice leaders and other staff to plan and implement strategies and tactics that support the acquisition of new/repeat business.	Participate in development of strategies related to firm's vision, as well as overall mix of markets, clients and projects. Participate in development of programs that enhance client relationship management.	Understand and be active in the market sector as well as related sectors (for cross-selling). Lead the effort to address strategic issues related to the market sector. Create marketing and business development strategies that provide the highest value to firm and clients within the sector.
Activities : Marketing and BD	Coordinate and/or manage firm's efforts related to : <ul style="list-style-type: none"> ▪ Business development tracking and support ▪ PR activities ▪ Database management ▪ Development of marketing and business development materials ▪ Development and maintenance of relationships with consultants and collaborators ▪ Market research ▪ Proposal development and production ▪ Special event planning ▪ Web site management 	Develop and manage client relationships that lead to new and repeat business. Assess client and project opportunities, including the need for customized services, risk management and firm's financial goals. Develop value propositions that provide highest value to firm and clients. Manage project delivery process for specific commissions. Participate in civic/professional activities that enhance firm image.	Be the principal author of value propositions for the market sector. Lead assessment of clients in the sector, including risk management and financial goals. Lead assessment of market trends and other external issues, including opportunities to cross-sell in collaboration with other Market Sector Leaders. Lead the effort to develop and organize resources within the market sector that will create the highest value for firm and its clients. Serve as ambassador and client advocate within the market sector, building relationships and securing new/repeat business.
Outcome	Impact on marketing/business development strategy and implementation. Marketing as a cost center. Relationship Capital: Access and Networks	Impact on firm's overall business, including markets, strategy, process and organization. Return on investment, primarily quantitative. Intellectual Capital: Capabilities Relationship Capital: Networks	Creation of competitive advantage within market sector. Greater share market sector. Return on investment, both quantitative and qualitative. Image Capital: Distinctiveness Intellectual Capital: Expertise Relationship Capital: Access and Networks
Typical Title(s)	Marketing Manager Proposal Manager Director of Marketing	Project Director Project Principal Principal-in-Charge	Market Sector Leader Practice Leader Principal-in-Charge

Table 6.13a Marketing Roles

These roles are among the prototypes we are seeing in contemporary professional service firms.

	Talent Agent	Business Development Broker	Driver of Growth
Constituency	Specific talent within the firm	Clients and decision makers	The practices of the firm
Agenda	Leverage opportunities to connect talent and clients, creating new and innovative relationships and outcomes.	Seek opportunities to develop and implement sales strategies with potential clients and decision makers that will lead to new business.	Leverage opportunities for firm to achieve strategic goals (i.e., diversity, capture market share, create distinctiveness, build brand).
Activities : Vision and Strategy	<p>Understand and have access to broadest cultural, social and economic contexts.</p> <p>Participate in development of innovative value propositions and strategies.</p> <p>Develop image and positioning strategies (aka "aura management").</p>	<p>Participate in development of strategy related to the overall mix of markets, clients and projects.</p> <p>Participate in development of strategy related to image and positioning.</p> <p>Develop programs that enhance client relationship management.</p>	<p>Lead the effort to create alignment between firm's goals and marketing agenda.</p> <p>Lead the effort to create coherent and integrated marketing/business development strategies that provide the highest value to firm and its clients.</p> <p>Understand and have access to the broadest cultural, social and economic contexts.</p>
Activities : Marketing and BD	<p>Serve as ambassador to build relationships.</p> <p>Create opportunities to position specific talent with decision makers and decision-influencers.</p> <p>Create promotional materials and opportunities (i.e., speaking engagements or publications). That enhance firm's image and positioning strategies.</p>	<p>Serve as ambassador to build relationships.</p> <p>Leverage firm's brand, positioning, networks and capabilities.</p> <p>Conduct market research/ reconnaissance that leads to prospective opportunities.</p> <p>Facilitate the introduction of firm principals.</p> <p>Participate in proposal and interview strategy/development.</p> <p>Maintain contact with clients during delivery of firm's services.</p>	<p>Be a principal author of firm's value propositions.</p> <p>Lead the effort to create opportunities that lead to sustainability.</p> <p>Lead the effort to assess markets and clients, including market trends, risk management and other internal/external issues.</p> <p>Lead effort to develop and organize resources that will create the highest value for firm and its clients.</p> <p>Participate as a Market Sector Leader or Closer/Doer in specific marketing/ business development activities.</p>
Outcome	<p>Creation of new value.</p> <p>Radical innovation.</p> <p>Return on investment, both quantitative and qualitative.</p> <p>Image Capital: Prestige</p> <p>Relationship Capital: Access and Networks</p>	<p>Creation of networks.</p> <p>Return on investment, primarily quantitative (fueled by sales, revenues and commissions).</p> <p>Relationship Capital: Access and Networks</p>	<p>Creation of competitive advantage.</p> <p>Greater diversity and share of markets/business.</p> <p>Return on investment, both quantitative and qualitative.</p> <p>Image Capital: Distinctiveness</p> <p>Intellectual Capital: Strategic Vision</p>
Typical Title(s)	<p>Director of Business Development</p> <p>Director of Client Development</p>	<p>Director of Business Development</p> <p>Account Executive</p>	<p>Chief Marketing Officer (CMO)</p> <p>Director of Corporate Development</p> <p>Director of Marketing</p> <p>President/CEO</p>

Marketing Roles (Con't)

	Public Relations Specialist	Market Research Specialist
Constituency	The firm and specific talent in the firm	Director of Marketing (or CMO) and Market Sector Leaders
Agenda	Serve as a content developer to create and implement strategies to enhance firm's image and position.	Serve as a content developer to create and implement strategies to enhance firm's success in marketing/ business development.
Activities : Vision & Strategy	Participate in development of positioning strategies for firm and key individuals, in accordance with business goals established by firm leadership. Lead the effort to develop innovative strategies related to image and content development.	Understand firm's vision and business goals. Lead the effort to conduct market research/reconnaissance regarding market trends, customer segments, economics and other factors that affect firm's strategies.
Activities : Marketing & BD	Serve as ambassador to media representatives and other external entities. Create opportunities to position firm and specific talent with decision makers and decision-influencers. Create promotional materials and opportunities (i.e., speaking engagements or publications) that enhance firm's image and positioning strategies.	Lead the research effort, gathering and analyzing information related to marketing/business development. Develop assessments on issues related to firm's competitive strategies. Participate in discussions related to assessment and development of marketing plans, especially related to changes in markets and other external issues.
Outcome	Impact on perception in minds of clients, decision makers and decision-influencers Return on investment, primarily qualitatively Image Capital: Distinctiveness	Impact on assessment of markets and targeting of prospective clients, as well as selection of primary consultants and collaborators. Return on investment, primarily qualitatively. Intellectual and Relationship Capital: Strategic Information & Access
Typical Title(s)	Director of Communications Director of Public Relations	Market Researcher Market Research Consultant

Marketing Roles (Con't)

Recommended Reading

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Nancy Egan, FSMPS, heads her own consulting firm, New Voodoo, which provides marketing strategy, image and content development, and media relations to the real estate and design community. Prior to establishing her independent practice in 1992, she held senior marketing and management positions with several international design firms. Through her work as an advisor and author, she addresses the role of design and designers in a variety of contexts.

A frequent author, lecturer, panelist, and workshop leader on a range of design, real estate, and marketing topics, her teaching experience includes the Executive Education Program at the Harvard Graduate School of Design and the University of Wisconsin and lectures at Yale University School of Architecture, Columbia University, and Rice University. She shares her expertise with various organizations and professional societies including the American Institute of Architects, the Society of Marketing Professional Services, and the Urban Land Institute. A former SMPS National President, she was the 1996 recipient of the Society for Marketing Professional Services Lifetime Achievement Award.

She received her Bachelor's Degree and a Candidate in Philosophy Degree at the University of California, San Diego and completed post-graduate work at the University of Wisconsin, Milwaukee, Center for 20th Century Studies and at Université de Paris III, The Sorbonne.

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Marjanne began her career in the design industry more than 35 years ago, working first in administrative and management positions for seminal design firms in San Francisco and later achieving the position of partner in an architectural firm that had grown from 15 to 85 people over a five-year period. She subsequently joined The Coxe Group as a consultant, applying the expertise that she had developed working within design practices, and in 1987, she established Marjanne Pearson Associates with Frank O. Gehry as her first client. With experience in management and consulting, she has particular expertise in architecture, interior design, landscape architecture, and urban design practices.

She received her Bachelor's Degree in English with an individual program focused on linguistics. Although she originally intended to teach elementary school, she found her true calling in training and development, working with leaders of design firms. Her professional teaching experience includes the Executive Education at the Harvard Graduate School of Design, the American Institute of Architects (AIA), and the Society for Marketing Professional Services (SMPS). She is the author of numerous articles that have appeared in the *AIA Practice Management Digest*, *Contract*, and *SMPS Marketer*.

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