

MARKETER

THE JOURNAL OF THE SOCIETY FOR MARKETING PROFESSIONAL SERVICES

VOLUME 34, ISSUE 4, AUGUST 2015



PRINCIPAL'S ISSUE

14 FINDING YOUR PATH TO LEADERSHIP

18 THE FOUR LEVELS OF LEADERSHIP

28 DEBUNKING THE MYSTERY OF MARKET ANALYSIS



Recreation & Wellness Center, Auburn University, Auburn, AL. HOK (formerly 360 Architecture). Photo by Brad Feinknopf, www.feinknopf.com.



The Four Levels of Leadership

Creating Your Future

By Marjanne Pearson

In my conversations with people in the A/E/C industry, the possibility of becoming a principal is often high on a person's list of goals and objectives, and it's usually perceived as well-deserved recognition. It usually offers the opportunity to participate in the firm's strategy agenda and have more control over decisions, as well as a larger share of the rewards that follow.

How is it perceived from the firm's point-of-view? For one of my clients, the road to principal begins with performance and commitment to the firm's culture of excellence, as well as the ability to lead a project effectively. It continues with developing the ability to lead multiple projects (or more complex projects),

combined with initial involvement in generating new work and the proven ability to articulate the firm's goals and aspirations.

The next step requires taking an increased role in generating new business, assuming an office-wide or company-wide role and responsibility, and being seen by others as someone who represents and lives the firm's vision. Once people reach principal level, they will be recognized by others (internally and externally) as proven leaders of the firm with the ability to develop and implement strategy. (See Figure 1.)

Most companies have at least four levels of leadership, each with their own opportunities to become principal. Yet each level has its own scope of responsibility, risk, and rewards as well.

FIGURE 1:

OWNERSHIP CRITERIA

AREA	CRITERIA
LEADERSHIP	Entrepreneurial spirit
	Ability to develop business
	Ability to lead firm (corporate)
	Ability to lead firm (design)
	Ability to attract talent to the firm
	Ability to develop and mentor
	National network
TALENT	Professional reputation
	Design
	Design technology (delivery)
	Information technology (infrastructure)
	Marketing and business development
	Project management
MANAGEMENT	Resource management
	Client management
	Project delivery
	Profitability
	Knowledge of construction issues
WORK ETHIC	Knowledge of legal issues / contracts
	Commitment
	Focus
VISION	Staff motivation
	Ability to represent and live the firm's vision
	Ability to develop and implement strategy

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LEVEL 1: Fiduciary Responsibility

The executive leaders in a firm—shareholders, principals, partners, sole proprietors, board of directors, executive committee, CEO, and C-suite—are responsible for vision and guiding principles, which in turn create the values and culture of the organization. Organizational development cascades from these core elements.

Executive leadership is also responsible for the overall business and development strategy for the organization, establishing and building its enterprises and initiatives, and selecting and mobilizing the leaders who will strive to inspire and achieve outstanding results.

But perhaps the most significant aspect of being at the fiduciary level is assumption of owner-level financial liability and risk—fiscal responsibility—from ensuring a pipeline of new and continuing business through payment of operating expenses, payroll, and taxes. Ownership means risk and responsibility.

Even in the early days of my career in the A/E/C industry, I held management positions. In the mid-1970s, I was the business manager in a start-up that became very successful, growing from

a staff of 15 to 85 in a couple of years. The founding partners began the process of ownership transition when they were in their early 40s. Five of us were associates (in our 30s), and we were tapped to become partners. Of course we were honored, but we didn't realize that it was serious until each of us wrote a five-figure check for two percent of the shares and then signed papers to personally guarantee the line of credit and office lease (six figures). The impact also came whenever we lost a project that we were counting on, there was a cash-flow issue, or we became aware of a potential claim against our professional liability insurance. I didn't own very much of the firm, but I was personally and professionally responsible for our legal, economic, and organizational performance.

LEVEL 2: Enterprise Responsibility

Enterprise leaders are focused on building the business—creating, developing, and executing products or services. Each enterprise is responsible for its legal, economic, and organizational performance (enterprise fiduciary responsibility) in accordance with guidelines set by the executive leadership.

Enterprise leaders have overall responsibility for the drivers of practice for their business:

- What are our ambitions and aspirations?
- What territory can we claim?
- What services will we offer, and to whom?
- What will make our brand distinctive?
- What talent, leadership, and expertise (both internal and external) do we need to achieve this?
- What investments do we need to make in order to achieve real value?
- How will we organize and develop our resources to create the highest value?

Enterprise leaders are responsible for balancing the needs of the business—practice models, leadership roles and strategic hires, investment initiatives—to ensure sustainable success. In addition to traditional business and financial metrics, their success metrics include brand recognition, market positioning, client development and relationship management, employee development and engagement, professional knowledge, and resource development.

This is an area in which we as marketers can have a huge impact; however, it's not just about marketing or business development. It's about business strategy. As true business partners, working with principals, we can become principals as well. As Dana L. Birkes, APR, FSMPS, CPSM, related in *The Evolving Role of the CMO (Marketer, February 2014)*, she armed herself with the tools to be a CMO—choosing opportunities to get holistic experience in the built environment, developing an understanding of financial fundamentals and overall operations, and building relationships with people she admired in those areas.

LEVEL 3: Practice Responsibility

Practices may include offices, divisions, departments, studios, or other groups designated as practice areas. The practice domain includes service offerings and value propositions, client and project management strategies, and operational resource development and management for the business.

Practice leaders have shared responsibility for the professional performance of the overall business, accomplished within its practices, in accordance with the guidelines, goals, and objectives established by the executive leadership and the enterprise leadership.

Practices are the engines of a professional services organizations, in which we as marketers create value every day, becoming true business partners working side by side with the practice leaders.

The professional practice agendas include:

- What services are we offering, and to whom?
- Are we creating competitive value propositions?
- Are we establishing design and execution guidelines and procedures to fulfill our professional responsibilities?
- Are we organizing and developing our resources to create the highest value?
- Do we have the talent, leadership, and expertise (both internal and external) to achieve our goals and objectives?
- Are all of our resources operating in concert and at full effectiveness?

Practice leaders are responsible for balancing the needs of the practice—client/revenue mix, service offerings, talent capability mix, operational strategies—to achieve excellence and ensure sustainable success. In addition to business and financial metrics, their success metrics include design and execution quality performance, client development and retention, portfolio development to support market position, employee development and engagement, and professional knowledge and resource development.

At the practice level, we have the opportunity to expand our boundaries (internally and externally) and identify the key result areas in which we contribute to each of the success metrics that matter most for sustainable success.

LEVEL 4: Project Responsibility

If practices are the engines of an organization, then projects are the vehicles. Project leaders are responsible for the legal, economic, and professional performance of their assigned projects, in accordance with the guidelines, goals, and objectives that cascade from the company leadership.

Project leaders have overall responsibility for project planning, design, development, and execution, balancing client objectives and requirements with company-wide standards of excellence. In addition to project design and delivery, project leaders are responsible for:

- Client relationship management
- Contract management
- Budgets, schedules, and profitability
- Billings and collections
- Staff management, including talent development, utilization, and engagement

In addition to business and financial success, metrics for project leaders include professional performance, employee development and relationship management, professional knowledge and resource development, collaboration and delegation, and consistent pursuit of excellence.

Note that principals often have responsibilities at the project level as drivers of specific projects, or more likely, a fleet of projects associated with a specific client. This is a core area for marketing as well, where marketing coordinators, proposal writers, and business development and PR specialists develop materials, network with consultants, plan special events, and implement initiatives and activities that will lead to the acquisition of new business or continuation of business with existing clients. It is where we build the trust and relationships that enable us to become business partners.

The Business Framework

Each company has a framework for its business that provides:

- An operating platform for its enterprises
- The infrastructure (resources, information, and systems)—the “energy grid”—necessary for growth and development. This typically includes marketing (communications, not business development), as well as administration, facilities/maintenance, finance/accounting, human resources, IT and knowledge management, and legal
- The governance structure to define accountability, authority, and control

As marketers, we can be an infrastructure resource, or we can become more integrated into the practices and enterprises. In either case, we can expand our boundaries, increase our value, and have a more significant impact on creating a sustainable future for our companies. These are the key result areas that lead to being recognized as a principal.

Each of us has the opportunity and challenge to create a roadmap for our future, navigating each level of leadership to find the best fit—where we not only create value for our company, but ourselves as well. ■

9 The Service That Surrounds Your Service



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10 Five Steps to Use Content Marketing to Support Your BD Efforts



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12 The Lost Art of Personal Calling



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14 Finding Your Path to Leadership: Eight Actions to Shorten the Journey



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18 The Four Levels of Leadership: Creating Your Future



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25 SMPS Member Spotlight



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26 How to Craft Your Market Survey to Drive Market Research



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28 Debunking the Mystery of Market Analysis



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31 The New 4 Ps of Marketing: Your Foundation for a Thriving Brand



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32 The MBA Dilemma: Solved by SMPS U



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33 An Inspired Man = A True Leader



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34 What's Your Why? Thriving in the Age of Choice



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36 Why Build the Profile of Individual Professionals?



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37 When You Wish Upon a Star



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38

Leadership's Role in Social Selling



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39

Three Tragic Misconceptions About Proposal Cover Letters



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40

How Proposal Writers Can Help Technical Staff Meet Deadlines



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42

Integrated Project Teams Boost Success on Construction Projects



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44

Lessons Learned from the Rebrand Trenches



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Marketer (ISSN 0 199-3690) is published bimonthly (February, April, June, August, October, and December).

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Postmaster: Send changes to *Marketer*, SMPS, 123 N. Pitt Street, Suite 400, Alexandria, VA 22314-1588.

Member annual dues are \$390, of which \$27.50 is allocated for *Marketer* subscription; nonmember subscription rate is \$115.50.