

Firing on All Cylinders: How to Energize Your Firm

By Pat Davidson

Your accounting firm could be just like an old car. It still runs every day. It has all the bells and whistles so it feels comfortable. But suppose there is a problem in the engine. Suppose the serpentine belt is failing and one day it will break altogether. You can choose to stop and fix it now, before it completely breaks down, or you can just keep running it as long as possible. Melinda Guillemette encouraged accounting marketers to help fix the problems by being leaders in their *behaviors* as well as marketing programs.

Successful firms do 4 things that are not on the list of required technical skills. Those four things are:

1. There must be connection.
2. There must be purpose.
3. There must be acceptance of self and others.
4. There must be gratitude.

Your partners may say, “Our Marketing Director must develop marketing programs and create results.” Guillemette says if you can demonstrate these four behaviors in your firm, you will be a leader toward success. It starts with you – you are accountable.

#1 Connection

Connection is defined as the sense that we are “in relationship” – in other words “we are all in it together.” The connection must be real. It can’t be faked. As Malcolm Gladwell writes in his book *Blink*, faces can’t lie – connection is made in milliseconds.

There are specific behaviors associated with “connection.” You must:

- Hold eye contact (don’t let your eyes wander around the room)
- Use names
- When you ask “how are you?”, stop and listen
- Smile
- Keep body language open
- Don’t answer your cell phone or click on your Blackberry
- If you can’t take time now, ask to speak on another occasion (be authentic)
- Leave your door open as much as possible
- Spend time on informal, impromptu connection

The marketing director must model this behavior since it is not common for accountants to be open.

#2 Purpose

Purpose is tightly tied to communications. It is a belief that we are doing important work, that it is done well, and that we make a difference with our work. We are doing what matters to our clients, our firm and ourselves.

Young accountants and new recruits are especially quick to question, “Why are we here?” They have grown up in a culture of abundance so, according to Maslow’s hierarchy of needs, they are past survival issues. They are on the road to self-actualization.

Marketing Directors can model “purpose” in several ways:

- Be a Thought Leader. Share your vision with everyone.
- Identify the firm’s core values. What is the soul of your firm? What makes it a living, breathing entity? Then it is critical that you live them, not just write them down.
- Communicate the firm’s vision of the future (mission, goals, strategy, etc.)
- Make sure everyone understands their role in reaching the firm’s goals
- Use your intranet, email and team meetings to reinforce the goals and let people know how close the firm is to achieving them.
- Celebrate successes
- Show your joy (and respect the joy of others)
- Use storytelling to convey important ideas
- Keep partner disagreements inside the group. It is destructive beyond measure to take it out to the team. Partners may fight in meetings, but after the meeting they must present a united front. There must be consequences to partners who poison your well.

#3 Acceptance of self and others

In an environment where everyone is always striving to be better, this cultural element is vital. This is the sense that one is comfortable in one’s own skin. Each individual must be who he or she is. Each must be good to oneself so there is energy to help others accept and believe in themselves.

This is especially important when working with professionals. Some of the smartest and most dedicated are also the most self-critical. They worry about justifying their hourly rate and their value. Their self-judgment and self-criticism can ooze over and tumble out to everyone else. Performance evaluations tend to be more critical.

Therefore, accepting yourself and demonstrate acceptance of others is more than a warm and fuzzy concept. It is vital to the health of the workplace.

Here is how to be a leader in this element:

- Lighten up. Give yourself a break. Relax and breathe. Smile and laugh more.
- Drop “should” and “shouldn’t” from your internal and external conversations. Be active. Criticism is passive. Solutions are active.
- Practice civility. Decide how you want to conduct yourself in every interaction. Don’t be a victim of somebody else’s misbehavior. Don’t take things personally.
- Know that you have an effect on people and accept responsibility for the emotional wake you create.
- Acknowledge the extraordinary. Recognize when things are done right and keep your mouth shut when things aren’t always right.

#4 Gratitude

Gratitude is the most emotional of these four elements, and very important. It is an essential component to personal happiness and to “firm joy.” Look around and you will see that “thank you” is not commonly said in today’s culture. Guillemette explains that you start by feeling gratitude for your life. Recognize “how fabulous is my life.”

In the accounting industry, the nature of the professional is to be process oriented. They tend to keep moving and not stop to celebrate.

How to lead in this area:

- Thank someone individually for helping you
- Touch them on the shoulder and look them in the eyes.
- Thank people with hand written notes.
- Take someone to lunch. Such interaction takes time. But these are opportunities to make deposits to emotional bank accounts.
- Nominate someone for kudos – internally or externally.

Results

With these 4 things, your firm can be firing on all cylinders. These 4 things will raise your energy level and enrich your own spirit, PLUS it rubs off on others and spreads the energy around the firm. The firm becomes better through your modeling of these leadership behaviors. It will help in recruiting and retention, in succession and stability. You will deliver marketing plans that people understand and accept and participate in.

Every engine needs maintenance and care. These 4 cylinders will drive your firm to success.

This is a summary of a presentation at the 2008 AAM Summit “Wild On Marketing.” Pat Davidson is Director of Marketing for Deming Malone Livesay & Ostroff CPA firm in Louisville, Kentucky.