



YOU'RE A PROFESSIONAL --I'M A PROFESSIONAL

Would Certification Help?

Every so often, the question of certification of professional services marketers emerges. Is certification – testing marketers to attest to their skills and competence -- the way to go for those of us who market professional services for lawyers or accountants?

The real problem is to find a way for professional service marketers to gain respect as professionals among professionals.

It's easy to see, then, why the law and accounting firm marketing professional might want a certification process. Presumably, it might solve a number of problems marketers face. It might attest to our own professionalism, to tell prospective clients or, for firm staff marketers, firm management, that we have competence in a body of knowledge that can effectively serve them. It might be a guide to those who hire or retain us. Presumably, it adds prestige (and self-esteem) in a world in which professional prestige for lawyers and accountants – but not often for marketers -- is a given. After all, certification works for lawyers and accountants. The difference is that lawyers and accountants require many years of education, apprenticeship, and a brutally tough bar or CPA exam. Moreover, there is the strength of law behind the process. Violate the law and you lose your license to practice, and your career as well.

I remember going through this discussion some years ago at PRSA – the Public Relations Society of America. Ultimately, they did it. SMPS, the Society for Marketing Professional Services, which serves marketers for the architectural, construction and engineering professions, has a fairly elaborate certification program. Having talked to representatives of both organizations, I get a sense of how these two associations have fared in certifying their members.

The first question, of course, is the real versus the perceived necessity for the process. Part of the problem is that early on in the development of marketing for the professional services it became clear that for the non-lawyer or non-accountant there is little hospitality in the law or accounting firm. Unpleasant, but understandable. There is no long standing tradition for marketing these professions. While client development itself is inherent in every practice, the formalized marketing process was not until relatively recently. This is beginning to change, but there are still marketers who lack a professional range of skills, or are still given marketing orders from partners who have only a mythical knowledge of

marketing, or are still functioning under anachronistic concepts of the elitism of the professional. And while lawyers, accountants and other professionals can point to their formalized training, it makes it difficult for them to accept as equals marketers who, despite the vast body of knowledge, skills and experience of many marketers, have no such credentials. Obviously, it can be difficult for the non-credentialed individual to function as equal to the heavily credentialed lawyer or accountant. And obviously, then, some form of credentialing, such as certification, might be useful.

Bill Scott of SMPS says that their people are pleased with their certification system, which was devised in conjunction with a professional testing organization. They've broken down their structure into what they define as a Body of Knowledge in six domains that define the practice of professional services marketing for their members...

- Domain 1: Market Research
- Domain 2: Market Plan
- Domain 3: Client and Business Development
- Domain 4: SOQs/Proposals
- Domain 5: Promotional Activity
- Domain 6: Information, Resource and Organizational Management

Mr. Scott reports that the program is growing, in part because members who are accredited tend to hire other members who are accredited. Keep in mind, though, the differences between marketing for architects, construction contractors, engineers, designers, and specialty consulting firms, and marketing for lawyers and accountants, of which more in a moment.

The PRSA certification program has morphed into one that is offered by not only the Public Relations Society, but several other organizations in the field as well, including local public relations chapters and such affiliated organizations as the IABC – the International Association of Business Communicators, and public relations practitioners for specific trades. It's designed and administered by an organization called the Universal Accreditation Board -- a professional testing company. On the PRSA web site, there is a sample 20-question examination. I took the test and got all but four questions right. The problem is that every one of the questions, which I assume represented the nature of the full test, required judgment, rather than skills. The funny thing is that I have had extensive experience in every one of the situations that was the basis for the questions, and succeeded mightily in each of the situations -- even where my answers to the questions were considered wrong. For example, one related to fluoridation, and another to crisis management. I was on the public relations team responsible for generating the original public acceptance of fluoridation, and even wrote the best-selling brochure that dentists distributed to their patients. And over the years, I have managed innumerable crisis situations -- and always successfully. I even won a Silver Anvil – the Oscar of the public relations profession — for a vast international public relations program that covered four European countries and every state in the

United States. (I apologize for the personal reference, but it's the only way I know to judge the nature and validity of the tests.)

Looking at the experience these organizations report, we see little substantial evidence that certification in these areas quite fulfills the promise that supporters promise. For example, the accreditation web site for IABC reports that "Because of the low participation [in the survey] ... the results are not statistically meaningful." Still, the promise for all the accrediting organizations is that certification improves credibility for both the individual and the profession, that it enhances the resume, or gives them peer approval. In the case of IABC, 60% of those surveyed say that it gives credibility for their department or organization, 40% say it increases the credibility of the profession, and 80% of those accredited say it benefits the communication profession by providing a professional global standard.

Maybe. In fact, these perceptions are subjective, and offer little substantive evidence that the promised value of certification is really perceived by those the profession serves.

The question arises as to the value of certification for law firm or accounting firm marketers.

A primary consideration is the difference between law firm marketing and the marketing context for both SMPS and PRSA and affiliated organizations.

While there are parallels between professional services and the types of businesses served by PRSA members and SMPS members, marketing for the legal and accounting professions differ from other forms of marketing in several substantive ways. In professional services marketing there are also rather intensive ethical structures. Superlatives, for example, are prohibited. In fact, the history of marketing for lawyers and accountants is a stormy one, full of *reasons why not*, rather than *ways how*, and the bar associations and accounting societies' attempts to protect the dignity and integrity of the exalted and sometimes paternal lawyer and accountant. Lawyers can't guarantee a specific outcome in a legal matter, nor disparage competitors. While manufacturers and other professions can legitimately attempt to persuade you to buy things you didn't know you wanted, lawyers can't persuade you to get a divorce if you're happily married. Marketing for lawyers and accountants can be very delicate. The major purpose of law and accounting marketing is to build name recognition, to project integrity, credibility and skills, and to serve as a foundation for selling. Ultimately, the sale is made by the lawyer or accountant who is involved in serving the client. (*If I sell you a vacuum, the vacuum stays and I go. If I sell you a professional service, I stay.*)

An architect can boast about structures he or she has designed, a contractor can do the same for roads his or her firm has built, designers can demonstrate their designs. The trades the organization covers is extensive, and as may be seen from the domains covered in the tests, the marketing services are extensive as well. The firms they serve warrant being called professionals, in some cases because of

the designations of their professional societies, based on education and tests, in other cases by licensing by government bodies. All of this gives them latitude for marketing much beyond that given to lawyers and accountants. This allows, as well, a different, more extensive catalog of marketing techniques – many of which may well be defined, measured, and certified.

Different in yet another way is public relations. It's an ease-of-entry profession. While education helps, you don't need much beyond college, and sometimes not even that. There are, of course, skills, but the basic skill set is relatively simple, certainly compared to that of a lawyer or CPA. What matters most in public relations is imagination and inventiveness, all of which are very difficult to measure and test. Granted, it looks easier than it really is, which makes it difficult to define the skills of good public relations. Granted, in today's society the growing competition for ideas is best fought by those who know how to disseminate them, but here too, the techniques are not as difficult as the imagination and inventiveness.

What then are the positives and negatives of certification of law and accounting firm marketers?

On the positive side, certification is a credential in a realm in which credentials are frequently more anecdotal than tangible. One of the things we've learned over the years is that it's difficult for lawyers and accountants to qualify and hire specialists in another field. As one of my very wise sons put it once, "If you had to hire a nuclear physicist, and ten resumes crossed your desk, how would you know who to hire?" This became abundantly clear in the early days of law and accounting firm marketing, when many firms hired people with some very strange background, with the kind of disastrous results that set professional services marketing back by at least a decade.

Certification certainly can enhance credibility, prestige, self-esteem, and a perception of integrity, but only if the certification program is marketed to the professional community. And only if the lawyers and accountants take it seriously, which, in the three decades of modern professional services marketing, has happened very slowly. Otherwise, it's like winning an award from an organization nobody's ever heard of. A recognized certification program can enhance a perception of the marketing profession as a practice with clearly defined skills and goals. A successful program can reduce the onus accrued to marketing by many outsiders, and may improve acceptability for the program within a firm.

But on the negative side, several decades of experience with accrediting marketers for SMPS and PRSA show that in both cases, acceptance by the professions marketers serve has not yet been universal. In both cases acceptance by clients has been slow. There is also the problem of non-accredited practitioners, many of whom are superior at the craft but don't feel they need certification, others of whom are not particularly good at marketing and serve to dilute any favorable attitude that might otherwise be fostered by successful marketers. And while an increasing number of people with degrees in marketing are entering the field, it's relatively easy to get into it without extensive education.

Unfortunately, most university marketing programs, including MBA programs, don't understand or teach the distinctive elements of professional service marketing.

There is the problem of the test itself, if one should be devised. Who writes it? Who supplies the criteria? How do you test judgment?

There is the cost of managing a program. PRSA and SMPS used outside testing organizations, who first had to be educated in professional services marketing – and then had to be paid. There is the cost and effort in educating lawyers and accountants about the value of a certificate – a massive effort. And who's to do that?

And finally, there is the reality that people outside the marketing profession are not – and probably never will be – concerned about certification. The benefits of certification may be accurately defined, but the anticipated result may be wishful thinking.

All the clients want is a marketing program that works, without too much of their own involvement in it. Testing may contribute to demonstrating ability, demonstrating experience will go farther, and assessing intelligence and imagination will cap it all. How do you test for that?