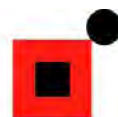




Research on Professional Development in U.S.-based Professional Service Firms

Overview Report



ExpertiseMarketingSM

**Suzanne Lowe, President
Expertise Marketing LLC
March 2011**

Table of Contents

Interviewee List & Demographics	3
Accounting Sector	6
Architecture, Engineering & Construction Sector	44
Executive Search Sector	79
Law Sector	96
Management Consulting Sector	123

Interviewee List & Demographics

Company Respondents	<i>Non Client-Facing (Marketing, Human Resources, Finance, etc.)</i>		<i>Client-Facing (central to the product/service firm offers)</i>	
	Current Leader	Future Leaders	Current Leaders	Future Leader
Large Firm				
Large Construction Company Thornton Tomasetti AMT Engineering CBIZ Tofias & Mayer Hoffman McCann P.C. Grant Thornton LLP Mottershead Consulting McGuire Woods Skadden, Arps, Slate, Meagher & Flom LLP (2) L.E.K. Consulting Boston Consulting Group The Hay Group McKinsey & Company Large Management Consulting Company Egon Zehnder International	5	7	1	2
Medium				
Barton Malow Company Legacy Professionals LLP PKF Texas	2			1
Small				
EDI, Ltd. Lucchesi Galati Ross & Baruzzini Cornwell Jackson Inc. SME (Serotta Maddocks Evans Co) LBA Group Pierce Atwood Burns & Farrey Small Management Consulting Company S4 Consulting Small Executive Search Firm	3	2	5	1

Sectors	Non Client-Facing (Marketing, Human Resources, Finance, etc.)		Client-Facing (central to the product/service firm offers)	
	Current Leader	Future Leaders	Current Leaders	Future Leader
<u>Accounting</u>				
CBIZ Tofias & Mayer Hoffman McCann P.C. Legacy Professionals LLP Grant Thornton LLP Cornwell Jackson Inc. Serotta Maddocks Evans Co. LBA Group PKF Texas	3	2	1	1
<u>Architecture Engineering Construction</u>				
EDI, Ltd. Barton Malow Company Large Construction Company Thornton Tomasetti Lucchesi Galati AMT Engineering Ross & Baruzzini	2	2	2	1
<u>Executive Search</u>				
Egon Zehnder International Small Executive Search Firm	1		1	
<u>Law</u>				
Pierce Atwood Mottershead Consulting Skadden, Arps, Slate, Meagher & Flom LLP (2) McGuire Woods Burns & Farrey	2	3		1
<u>Management Consulting</u>				
Small Management Consulting Company L.E.K. Consulting Boston Consulting Group The Hay Group S4 Consulting McKinsey & Company Large Management Consulting Company	2	2	2	1



Research on Professional Development in U.S.-based Professional Service Firms

Accounting Sector



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Respondent Number	Interviewee	Date of Interview	Profession	Firm Size	Non Client-Facing (Marketing, Human Resources, Finance, etc.)	
					Current Leader	Future Leader
R7	Marc Busny (2010-2011 President - Association of Accounting Marketing (AAM) Board) Managing Director & Chief Marketing Officer CBIZ Tofias & Mayer Hoffman McCann P.C. 350 Massachusetts Avenue Cambridge, MA 02139 617.761.0565 MBusny@cbiztofi.com	8/4/2010	Accounting	Large Regional National Firm	X	
R8	Julie Tucek (2010-2011 Immediate Past President – Association of Accounting Marketing (AAM)) Marketing Director Legacy Professionals LLP 311 S. Wacker Drive, Suite 4000 Chicago, IL 60606 312.384.4292 voice jtucek@legacypas.com	7/22/2010	Accounting	Medium Regional Firm	X	
R9	Edmond V. Russ Business Development and Client Experience Consultant Partner, Chief Marketing & Sales Officer (retired) Grant Thornton 175 West Jackson Boulevard Chicago, IL 60604 312-602-8004 Edmond.Russ@us.gt.com	8/16/2010	Accounting	Large Firm	X	
R10	Marketing Manager Cornwell Jackson Inc.	12/9/2010	Accounting	Small Local Firm		X

R11	Jessica Neville Marketing Assistant SME (Serotta Maddocks Evans Co) 701 Greene St, Suite 200 Augusta, GA 30901 706.722.5337 voice jneville@smecpa.com	7/25/2010	Accounting	Small Regional Firm		X
					<i>Client-Facing (central to the product/service firm offers)</i>	
					Current Leaders	Future Leaders
R12	Partner LBA Group	7/25/2010	Accounting	Small Regional Firm	X	
R13	Rafael Carsalade Senior Manager - Tax PKF Texas 5847 San Felipe, Suite 2400 Houston, TX 77057 713.860.5412 voice rcarsalade@pkftexas.com www.pkftexas.com	8/10/2010	Accounting	Medium Regional Firm		X

Professional Development Environment

1. Does your firm make available to you any kind of formal program so that you can grow your skills in marketing, business development or leadership?

Non Client-Facing Current Leaders

- R7 No, there are no formal programs for marketing professionals.
The firm will reimburse a portion of executive education programs or advanced degrees.
- R8 There is no formal in-house training program for marketing professionals - Firm uses outside training.
There is a formal in-house training program for CPAs to earn CPE credits.
She trains accountants in marketing and other topics of interest and uses outside resources when there is a need.
- R9 Not specifically with respect to marketing, although. Anytime I wanted to go to a conference (Association for Accounting Marketing, Business Marketing Association) the firm would encourage me and pay for my attendance. So from that point of view, yes they did. Were there any high-level Marketing and Sales courses available in the firm, NO, aside from those I developed myself (or my people did). Now we have developed a number of in-house marketing and business development courses, delivered to both less-experienced and senior marketing and sales people. We also have developed and continue to develop a series of business-development courses, online and face-to-face, which are addressed specifically to client service partners and managers.

Non Client-Facing Future Leaders

- R10 No.
- R11 There is nothing available for marketers except the AAM.

Client-Facing Current Leaders

R12 Several third-party offerings are available including:

- The Growth Partnership - training for current and future partners with a focus on leadership.
- The Management Summit - for partners – focuses on leadership.
- AAM Conferences – for revenue- and nonrevenue-generating professionals.
- National Tax Institute, AICPA – both of these organizations have leadership training for all types of professionals.
- Others – there are other institutions that offer leadership training that also offer marketing and selling, sometimes time management.

Client-Facing Future Leaders

R13 Yes.

1a. What types of professional development is made available to you?

Non Client-Facing Current Leaders

R7 None.

R8 N/A

R9 They would have made professional development available to me had I asked, but I already have an MBA, so I never asked. But one of my people was interested in getting her MBA, so the firm helped pay for it.

Non Client-Facing Future Leaders

R10 Firm-sponsored PD or training curriculum – There is no firm-sponsored PD of any sort – all training comes from outside vendors.

- Firm pays for AAM membership – she has access to and uses services they provide including round-table calls, conferences, etc.
- BKR International (www.bkr.com) – **Cornwell Jackson is part of BKR's international network of accounting firms** – they have a marketing committee, she participates in quarterly calls to discuss ideas, etc.
- AMA webinars – participates occasionally if of value to the firm.

Firm-sponsored mentoring program – None.

Executive Coaching – None.

MBA and other **Master's** degrees – None.

Executive education:

- They discussed sending a revenue-generating professional to Upstream Academy (www.upstreamacademy.com) but determined they could not afford to take the time off (billable hours in a small firm are crucial).

Certificate or Certification Program – None.

R11 Firm-sponsored PD or training curriculum – Nothing.

Firm-sponsored mentoring program – Yes, in-house mentoring program. She meets with a managing principal (other than her boss) each week.

Executive Coaching – Unsure.

MBA and other **Master's** degrees – Some get MBAs – the firm encourages but she does not know if the firm pays.

Executive Education – None, but she goes to Chamber events, Women in Business, etc.

Certificate or Certification Program – None.

Client-Facing Current Leaders

R12 Firm-sponsored PD or training curriculum – Use third party organizations as described above.

Firm-sponsored Mentoring Program – Have an in-house program for future leaders. Future leaders are mentored by partners they do not routinely work with.

Executive Coaching – Have an in-house program for future leaders. Future leaders are coached by partners they routinely work with.

MBA and other **Master's** degrees – Yes, use outside institutions and encourage participation.

Executive education – Yes, use outside institutions and encourage participation.

Certificate or Certification Program - Yes, use outside institutions and encourage participation. Examples include training in forensic accounting, valuation and technology auditing.

Client-Facing Future Leaders

R13 Firm-sponsored PD or training curriculum –

- Leadership Track Program - this is available to all professionals (on the revenue-generating side) globally. Levels 1 - 6 range from staff level to managing partners. As a senior manager, Rafael is on level 4.

Firm-sponsored Mentoring Program –

- Leadership Development Program - includes both coaching and mentoring programs.

Executive Coaching –

- Leadership Development Program as described above.

MBA and other **Master's** degrees –

- Firm pays partial reimbursement on a case-by-case basis.

Executive Education –

- Have some marketing programs created and taught by in-house marketing professionals.
- Also use outside firms including:
 - Conferences / webinars.
 - David Maister lectures www.davidmaister.com/.

Certificate or Certification Program -

- Not aware of any, especially on the tax side.

1b. Is everyone at your firm given the opportunity to take advantage of the professional development and training offerings?

Non Client-Facing Current Leaders

R7 Yes (from outside providers).

R8 Yes, if it is relevant to their jobs.

R9 Yes.

Non Client-Facing Future Leaders

R10 Not sure as the overall PD program is somewhat undeveloped - likely that all would be given the same opportunity if the right business case could be made.

R11 No.

- Principals, directors and marketing professionals are given opportunities.
- Senior accountants, administrative staff, interns, etc. are not given opportunities.

Client-Facing Current Leaders

R12 Yes, everyone is able to take advantage of PD and training but it depends on what each **individual's interests and motivations are**. Everyone gets the opportunity to take the generic offerings but they use a little more discretion when it comes to more expensive offerings (i.e. you have to show some promise if they are going to pay for your MBA).
Note that this is the perspective primarily of revenue-generating partners - but he believes that marketing professionals should also be considered revenue generating.

Client-Facing Future Leaders

R13 Yes.

1c. If your firm conducts its own professional development or training, why might you seek or request an outside provider like an industry organization, university, etc.?

Non Client-Facing Current Leaders

R7 N/A

R8 N/A

R9 There are some other courses our firm developed from outsiders. I remember taking a class in negotiating skills (I don't remember if it was internal, but it was taught by an outsider).
Association for Accounting Marketing courses also meet the description of Continuing Education.
Northstar conferences. When he was a speaker, he took their courses while he was at the conference.

Non Client-Facing Future Leaders

R10 N/A

R11 She might seek outside providers for further credibility, accreditation and recognition.

Client-Facing Current Leaders

- R12 Outside organizations have the resources and time to create great programs and offer a fresh perspective that:
- Is not tainted by internal perspective and opinions.
 - Reflects perspective and opinions held by a broader range of professionals - this includes ideas that have not been considered within the firm.
 - Best practices from areas that they do not practice in that might be relevant to their current challenges.
 - Best practices from areas that they do practice in that have not been previously considered.

Client-Facing Future Leaders

R13 Will conduct its own training when they have the expertise in-house and / or it is not too time consuming to create it; if not, they use outside resources.

1d. If your firm uses an outside provider like a university, why did your firm choose this particular type (of university)? What factors are important?

Non Client-Facing Current Leaders

R7 Knowledge of the accounting industry.

R8 They probably would not choose a University at this time. The firm leaders would need to understand what additional value a **marketer's getting an MBA would bring to the firm. However, if value *could* be shown as to why a marketer should get an MBA, they would consider it.**

R9 None (does not use a university).

Important factors: 1) credibility and credentials for the speaker /instructor 2) The relevance of the topic to my responsibilities 3) the timeliness of the topic (For example, social networking) 3) Google search 4) marketing strategy 5) building brand equity and 6) using social media.

When I attend Business Marketing Association seminars or breakfasts, if I notice people from Northwestern University, I pay more attention to those and attend them more.

Non Client-Facing Future Leaders

R10

R11 The most important factor is locality – they like staying local and traditional.

Cost and quality are important.

Personal interest is a factor – similar to referrals and prior experience.

Client-Facing Current Leaders

R12 Important factors in choosing an outside provider include reputation, referrals and word of mouth.

Client-Facing Future Leaders

R13 Don't know.

1e. Have you pursued your own pathway to grow your skills in marketing, business development or leadership?

Non Client-Facing Current Leaders

R7 Yes – conferences, misc. training programs, MBA.

R8 Yes, attend conferences, seminars, AAM chapter meetings.

Interaction with professional colleagues - learning from peers at other firms is important.

R9 MBA

Non Client-Facing Future Leaders

R10 Yes.

- Reads articles from industry trade journals, blogs, etc.
- Other technical training (like Adobe Creative Suite Program).

R11 She hasn't pursued her own pathway yet but would consider it (She just graduated from college May 2010).

She is not aware of classes or certification exams that are available but understands the importance of taking or getting them.

Client-Facing Current Leaders

R12 Yes, he is currently pursuing his own pathway and did the same during his 13 years at Ernst and Young and two years with Arthur Andersen (where he worked on the consulting side of the business).

The main interest is to bring in additional business - believes that focusing on business development and leadership is key to this.

He is instrumental in and always involved with introducing outside professional development firms to his firm including:

- The Growth Partnership – www.thegrowthpartnership.com.
- The Management Summit – www.managementsummit.com.
- Steve Waterhouse – www.waterhousegroup.com – focuses on selling, brought in as a consultant.
- Steve Erickson – www.stebeericksoncpa.com – focuses on all, brought in as a consultant.
- Stop at Nothing – www.stopatnothing.com – focus on leadership, used the HILS program (High Impact Leadership).
- AAM Coordination – he has taken on a leadership role.

Client-Facing Future Leaders

R13 No, the firm's offerings are adequate.

1f. What has driven you to pursue your own pathway? What do you hope you can gain from pursuing your own skills growth avenues?

Non Client-Facing Current Leaders

- R7 Continually improve skills.
Greater advancement opportunities and compensation.
- R8 Always looking to perform at a higher level and bring additional value to the firm.
- R9 (Did not ask.)

Non Client-Facing Future Leaders

- R10 Broaden her skill set.
Address problems from a bigger picture perspective – look at situations from a different angle.
Wants to learn more about client relationship management.
- R11 She believes that pursuing her own skills growth avenues or certifications would set her apart from others and make her unique.
She might be able to get experience in niche markets which would increase her value as an employee.

Client-Facing Current Leaders

- R12 The main driver in pursuing his own pathway is that it's fun and "it keeps it interesting." He loves change.

Client-Facing Future Leaders

- R13 N/A

1g. What avenues are you pursuing / did you pursue? Who provided this training?

Non Client-Facing Current Leaders

- R7 AAM Conferences, webinars.
MA Society of CPA Practice Management Conference.
Completed his MBA at Suffolk University over five years – 1 – 2 courses per semester, about 10 hours / week.
Currently participating in a Harvard Executive program in affiliation with the Boston Chamber of Commerce.
- R8 AAM Board – can gain valuable leadership experience and work alongside talented marketers – interaction with them is highly important (see Q1e).
AAM Conferences.
- R9 MBA – University of Pittsburgh – family paid if I got it in one year. Early in my career.
Certified business communicator (CBC) credential from Business Marketing Association.

Non Client-Facing Future Leaders

- R10 As described above.
She has to determine what to do on her own, they have no firm precedent.
- R11 N/A

Client-Facing Current Leaders

- R12 See 1e.

Client-Facing Future Leaders

- R13 N/A

1h. How important to you is a formal degree or certificate? Why? What do you hope will happen once you have your degree or certificate?

Non Client-Facing Current Leaders

R7 Degrees are important – a certificate representing a 1 – 2 week course is of lesser importance.

- The learning is the most important thing.
- If a 1 – 2 week course is commonly accepted and / or well regarded within the industry, then a certificate representing completion would be more important.

MBA degree is important because:

- Build contacts – networking.
- Build skills and provides for a more well-rounded professional.
- Provides a great credential.

Again, the main goal is career advancement, higher compensation.

R8 Degrees are very important obviously. A formal degree or certificate could be important for marketers in the future. If the need were clearly articulated (and quantified) or if it were required, a degree could be very interesting. In general, smaller firms might question a degree if it only meant the marketer would price him- **or herself out of the firm ... or leave** the firm. My firm would need to be shown the value of helping a marketer to get an MBA.

There is great value in getting an MBA if it had a concentration in professional services.

R9 It was critical that I got an MBA. My undergrad degree was in a non-business related field. I had to get a business credential.

Non Client-Facing Future Leaders

R10 Not vital but nice to have. She already has a **Master's** in Marketing and questions whether she needs more formal training although additional certifications **can't hurt**.

- R11 She thinks formal degrees and certificates are important but not as important as experience – a certification coupled with experience would be an added bonus and make her stand out.
- Certifications allow you to learn about current events whereas her BA in Marketing often focused on traditional things, had dated textbooks, etc.
- There needs to be a certain amount of time between a formal degree like a BA and the attainment of a certification – time to get valued experience.
- The benefits of attaining a certificate include:
- Become an expert in something.
 - Learn more – this is personally fulfilling.
 - Build her reputation as a marketing professional and increase her marketability both within the firm and outside of it.

Client-Facing Current Leaders

- R12 A formal degree or certificate is of some importance.
- **Graduates with Ivy League degrees may or may not be in tune with what's going on in the real world.**
 - They let you show credibility with what you do – but at the same time you have to prove it in the beginning.
 - They offer a positive initial impression and help open doors.
 - It is good to have designations but they must be enhanced with real skills that differentiate you from competition. The important thing is what you do with it and how you nurture it into useful skills.

Client-Facing Future Leaders

- R13 Important - “lends itself to something tangible to look at.” Having a formal degree or certificate effectively differentiates some professionals from others - it means they have successfully accomplished something that establishes greater market value (i.e. salary).

1i. Did your firm pay or would they pay for or reimburse you for pursuing your own pathway to grow your skills?

Non Client-Facing Current Leaders

- R7 The firm pays for all AAM conferences.
- The firm reimburses for up to \$3K per year for personal professional development.

R8 The firm pays for training.

R9 (Did not ask.)

Non Client-Facing Future Leaders

R10 Yes, but must present / discuss the business case.

R11 The firm would probably pay for a certification but not for an MBA – it might share some of the cost of an MBA. The firm would more likely pay for a one-week course versus and one-year program.

Client-Facing Current Leaders

R12 The firm pays most of the time for professionals to grow their skills – but you must pass the course or take the exam, etc. Smaller firms don't always pay.

Client-Facing Future Leaders

R13 N/A

1j. What outcomes do you believe are prioritized for professional development by the firm? What do you think the firm is hoping that employees get out of the professional development and training opportunities?

Non Client-Facing Current Leaders

R7 Increased knowledge, ability to drive firm growth.

R8 Firm priorities in training:

- How to best serve clients.
- How to keep employees happy and growing.
- How to get the best training available.
- Increased profitability and firm growth.

R9 Ideas, programs, practices that would make us more competitive and achieve market share.

Non Client-Facing Future Leaders

R10

R11 Prioritized outcomes include:

- New and fresh ideas.
- Access to different tools that can be shared with others in the firm.
- Networking and the ability to reach potential clients.

Client-Facing Current Leaders

R12 Outcomes prioritized by the firm include:

- Increased career skills and the ability to grow the firm in the future.
- Expanded knowledge of best practices.
- Career enhancement for the individual – even at the expense of the individual leaving the firm.
- Overall professional development.

Client-Facing Future Leaders

R13 The ability to better manage day to day operations from a management / leadership perspective (not technical skills, softer skills).
The ability to provide better client service.

Professional Development - Opinions

[NON CLIENT-FACING: Some professional and business service leaders have told us that firms will increasingly seek some kind of recognized credentials from their nonrevenue-generating leaders in marketing, business development, operations, finance, HR or IT.]

2a. What is your opinion of this statement?

Non Client-Facing Current Leaders

- R7 Great idea – management thinks nonrevenue-generating professionals are important.
- CPAs do not look down on marketing, IT, etc.
 - This is different at every firm – agreed that in some firms, nonrevenue **generators are considered “support.”** (This was **interviewer’s experience at a large international accounting firm – PwC** – which is driven by a partnership model where partners are revenue generators.)
 - The difference between CBIZ Tofias and other firms could be that nonrevenue-generating folks like Marc have partial founding equity; he has been there since inception.
- R8 May or may not be applicable at my firm.
- R9 This is probably a true statement with respect to recruiting new people. I haven't seen evidence of this with respect to current employees. This criteria, if it showed up on a resume, would give a person an edge on getting a job.

Non Client-Facing Future Leaders

- R10 May be true in the industry but not necessarily at her firm.
- R11 This is a true statement because people want to learn new ideas and new ways of doing things. **“Certification would add benchmarking.”**

2b. Would this increase your likelihood of seeking an additional credential?

Non Client-Facing Current Leaders

R7 Yes – any credential can improve how one is viewed in the market – it adds legitimacy to the function.

R8 Not sure at this time.

R9 For younger people, yes.

Non Client-Facing Future Leaders

R10 Yes, because “it’s all about marketing yourself.”

R11 Certification would increase the likelihood of seeking additional credentials – it would lead to advancement, fulfillment. “Of course if everyone were doing it, I would too.”

[CLIENT-FACING: Some professional and business service leaders have told us that their firms will increasingly seek practitioner-managers whose credentials set them apart from “home-grown” leaders.]

3a. What is your opinion of this statement?

Client-Facing Current Leaders

R8 Again, not sure this applies at a mid-sized or small firm. However, can certainly see this to be true at larger national firms. Regardless, it’s vital to prove value to firm.

R12 He agrees with this because all professionals have different backgrounds. Additional training will complement what they can do internally. An example of what could be aspired to is – they have access to a retired partner from PwC – he has skills that the folks at the firm have never been exposed to.

Client-Facing Future Leaders

R13 “This is true to some extent” - this would overcome a current gap in skill sets. It would make sense to bring in professionals from outside firms as a short-term fix for situations where you don’t have in-house talent.

3b. Would this increase your likelihood of seeking an additional credential?

Client-Facing Current Leaders

R8 If the credential and experience gaining it will improve role at firm, this could be of interest. For folks looking to join new firm, this could be of value as well.

R12 Yes, this would increase the likelihood of seeking additional credentials in target areas.
A certification or designation of skills will help their marketing efforts within these target markets.
A certification or designation of skills could also help them move into new areas with different offerings – and help them determine if they should move into these areas.

Client-Facing Future Leaders

R13 “Yes, it would make me more marketable and add value to my career both internally within the firm and externally to clients.”

Cross-Sector Institute Discussion

The creation of a cross-sector Center, Institute, executive education course, certification and/or graduate degree program on professional services leadership (i.e., competencies to more effectively direct, steer, manage and/or grow a professional or business service firm, including marketing and selling). This type of Center would be aimed at anyone who has or desires to gain decision-making responsibilities for the firm's growth, competition and survival.

A Center like this could:

- **...offer an array of choices for growing one's skills: short customized executive education sessions; formal certification credentials; and/or an executive master's degree.**
- **...conduct and/or support cross-sector research, conferences, case studies (and other data) on the emerging and best practices of firm growth, management or leadership.**
- **...be housed at a University, but it might also be free-standing.**
- **...support and/or extend an Association's credentialing and/or research agenda.**

Initial Reaction

Non Client-Facing Current Leaders

- R7 Great idea – this will complement the goals of the AAM which is to allow people to help firms become more successful. They are trying to raise the profile of marketers.
This idea could really help – “it's not all about making brochures, it's about making money.”
- R8 Likes the idea of all of the offerings. She favors a shorter time commitment, which could be more intriguing than getting an MBA because of additional time commitments that go along with an MBA.
She is aware of similar programs such as Harvard's two-week executive leadership programs and others. The most important attributes of this include:
- Has a good brand name.
 - Lesser time commitment.
- R9 For years, as a part of the executive advisory committee for the Association for Accounting Marketing, I have recommended they do this or at least look into it. This concept would have great appeal for advanced and entry level marketers.
Turning this concept into a business would be a challenge. If you ask most professional service firm marketers, they would be interested.

Non Client-Facing Future Leaders

R10 Feels that it would benefit revenue-generating leaders more than her.

- Marketing is just one part of the client relationship process.
- Feels that the skills like leadership development and managerial skills are more appropriate for leaders of the firm.
- **Partners / founders / leaders of small firms are key to these firms' survival** – everything revolves around them. She goes to marketing presentations with them but all firm decisions are made by them.

Interested in learning what skills would be taught.

R11 This is a good idea that would be of huge benefit. **It would create a "meeting of the minds" where you could meet with other experts and share ideas.**

Sharing ideas is huge in the professional services industry and is one of the benefits of the AAM.

- This was her first year in the AAM – she believes it is a unique organization and gives her the idea to meet with people with similar responsibilities. Some excel at things she struggles with and vice versa. If someone is enrolled in an institute – this collegiality will only increase because of constant contact and will create a reservoir of ideas similar to a library.

This will give her access to best practices.

It might be difficult at first to establish credibility if structured as a free-standing institute. It might be easier to start at a university. Note – she did not consider that at one point, there was only one person with a CPA license.

"She would be honored to be among the first graduates of such an institute."

Client-Facing Current Leaders

R12 This is a good idea. Some clients are starting up knowledge centers and bringing in seasoned professionals to educate younger professionals (sounds similar to this).

There is a gray area with the MBA degree which has a more general focus.

Client-Facing Future Leaders

R13 Good idea - They are doing similar things at PFK and see value and credibility in it. The overall educational environment [at PFK and elsewhere] is morphing towards this - leadership today [versus 20 years ago] has a need for updates, refresher courses, etc. and has the need to continue complementing the technical side of the business with managerial and leadership course content.

Despite what they already do in-house - more could be done to improve it. Their in-house program focuses more on leadership and less on marketing.

4a. What elements are most important or attractive?

Non Client-Facing Current Leaders

- R7 A graduate degree in professional services marketing – an MBA or JD level degree represents a substantial commitment both in terms of time and money. These represent real certification programs than mean a lot more than a one- or two-week certificate. Housed in a university setting – this is how the designation for financial planning started – the CFP.
- It started in Denver, CO and then moved to Boston University and on to other schools.
- R8 Reputable name and a big city.
- R9 Conferences would be the most attractive.
- Credentialing is the core of the appeal for me. You could get a variety of credentials. The variety is important. If I chose a **Master's** degree, it would be a high degree of time and cost. But credentialing in certain areas, this is a good way to improve knowledge base, and get smarter. I would use those credentials to differentiate myself as a prospective employee.
- Case studies that showcase ideas of specific best practices, say in social media marketing plans. Or case studies of people who successfully completed these courses and showed increases in salaries and growth in career, etc.
- Benchmark research data might be good. For example, what kind of click-through some can I expect from my Google advertising campaign? How many times do you have to call on a client before he or she will buy?

Non Client-Facing Future Leaders

- R10 Leadership development – this is an area of her career **where she doesn't have a lot of experience, and does not get a lot of guidance.**
- R11 Networking, resource availability, education, the opportunity to gain certifications and / or additional degrees, continued opportunities for advancement, the ability to take more than one course [in an institution].

Client-Facing Current Leaders

- R12 Fresh, sensible ideas that work would be the most attractive element.
- Finding ways of putting these ideas into practice (vs. textbook knowledge) would be important.
- Arthur Andersen was good at taking textbook concepts and creating real life situations out of them. They did this out of **their "university" near Chicago.**
- The program would need to have leaders / trainers / teachers with these skills. It would need a combination of academics and industry experts – industry experience is important.

Client-Facing Future Leaders

R13 Personal growth - the ability to gain non-technical yet necessary skills that are critical but often overlooked.

He agreed with the following perspective - *It is widely-speculated that the people who make it to partner in professional service firms often have an equally good balance between technical skills and managerial / selling skills. There are a lot of others who may be great on the technical side but are never able to develop the softer skills necessary to grow the firm from a leadership perspective or from a selling / relationship management perspective.* This idea may help improve this deficit.

4b. What elements are least important or attractive?

Non Client-Facing Current Leaders

R7 Time element:

- Need to be at an organization that will allow you to take the time.
- Having personal time available.
 - He did his MBA when he was newly married – now he has young children and it would be much more difficult.

R8 Lengthy time commitment and high cost.

R9 Non-relevant research may not be that attractive.

Case studies: unless they are used as an approach to learning, or give examples of what happened in particular **areas, these don't** have much meaning. (Otherwise, they could be very attractive!)

Non Client-Facing Future Leaders

R10 Location – **doesn't want to travel.**

University environment – Q5.

R11 Location could be an impediment if you have to drive a long way to it on a weekly basis – but not so much if it was short term.

Client-Facing Current Leaders

R12 The opposite of Q4a.

Client-Facing Future Leaders

R13 Attaining these skills is not fun or enjoyable - **it is a necessary step outside of one's comfort zone that** takes you away from the normal client routine (i.e. billable hours).

4c. What else would you like to see included?

Non Client-Facing Current Leaders

R7 See Question Q4e.

R8 Discussed.

R9 (Did not ask.)

Non Client-Facing Future Leaders

R10 Mentor program.

R11 Membership benefits and alliances with other businesses, companies and alumni.
Web-based classes – **especially when people can't make the commute or would prefer distance learning.**

Client-Facing Current Leaders

R12 Nothing.

Client-Facing Future Leaders

R13 Adding CPE credits to this would value.

Bringing people from other firms and disciplines together - you can break them up into different groups and allow them to share best practices, discuss nuances, etc.

4d. What would be a key differentiator that might result in you considering participating in one or many of the services offered?

Non Client-Facing Current Leaders

R7 Times offered.

Location.

Prestige of affiliated university.

R8 Discussed.

R9 It would have to be an institution that has its own credentials. Recognized credentials. Getting a credential from this institution would have to appear worthy – like Harvard versus a defunct Parsons College.

Non Client-Facing Future Leaders

R10 Mentor program –

- There should be an effort made to match mentors with mentees – experiences, goals, aspirations of each should be the same. The important thing for her is to benefit from the perspective and guidance of someone who has been successful in his / her own career in a similar manner.

R11 The ability to focus and pick courses or programs that interest her and can further her career more.

Client-Facing Current Leaders

R12 A key differentiator would be pricing – would like to see a group pricing option.

Would like the ability to bring CFO/COO client leaders to such a program.

Client-Facing Future Leaders

R13 The ability to show that this type of training is important and adds value - **it needs to start early in one's career**. He can see the value in this idea because he is going through it - but also believes that it needs to be complemented with good statistics, success stories, etc.

4e. What content areas or topics do you see as being most critical for your professional development?

Non Client-Facing Current Leaders

R7 A focus on marketing and leadership for professional services firms – need to include marketing strategy, business development, presentation skills, relationship building and finance.

Focus on the financial aspects of business – marketers often lose sight of this. They need to be reminded to consider revenues, ROI, etc.

R8 Marketing and business development courses; business and finance.

R9 (Did not ask.)

Non Client-Facing Future Leaders

R10 Metrics, measurement methods – how to determine the ROI of marketing campaigns.

R11 Social media.

Web analytics – for example, knowing how to interpret additional traffic to web sites, or certain areas of web sites.

Specific courses for different industries – for example – “accounting marketing”, “real estate marketing.”

Client-Facing Current Leaders

R12 Additional valuable content would be:

- A focus on technology.
- How to leverage social networking.
- What has worked for others.

A focus on the issues of different generations of workers is critical.

Client-Facing Future Leaders

- R13
1. Managing people.
 2. Marketing and business development.

4f. What delivery formats would you most prefer?

All face-to-face workshops/courses at the employer site.

All face-to-face workshops/courses in a university.

All online.

Non Client-Facing Current Leaders

R7 Offsite face-to-face lectures strongly preferred – there are too many distractions on-site.
Definitely not all online.
Hybrid OK.

R8 She prefers a mix of face-to-face, on / off site, online. But also believes that that people may travel for this.

R9 **Depends on master's degree (major time commitment)** – must have online non face-to-face learning in order to conserve time and expense. Have to be hybrid.

Non Client-Facing Future Leaders

R10 Hybrid would be the most effective but there must be an initial face-to-face component.
Could include online, phone, webinars, etc. that follow initial face-to-face meetings.

R11 She would prefer face-to-face but realizes traveling might be an issue for some.
Hybrids, webinars are good too.

Client-Facing Current Leaders

R12 Internet training is effective and possibly even more-so than classroom training.
An offsite location with no distractions is good.
A hybrid model would probably work the best.

Client-Facing Future Leaders

- R13 Workshops with people from different firms and disciplines.
In-person and “out of the office” is important.
A university environment might not work (too formal?).
All online format - is not as effective given the nature of what is being taught.
Hybrid online format - could work for a portion of the non-interactive course material.

4g. What credentialing, if any, would you consider?

Master’s degree

Certificate – what kind?

Other credentials

Non Client-Facing Current Leaders

- R7 Graduate-level degree.
Note – this question was initially misinterpreted to represent “entry criteria” – he believes that an individual must have at least ten years of experience to enter such a program.
- R8 Would consider all of them as developed.
- R9 Best is an MBA with a special emphasis in professional service firm marketing. The MBA has cachet and reputation. Certification is next. I used my certified business communicator (CBC) credential from BMA. It helped in my getting a job and perform better.

Non Client-Facing Future Leaders

- R10 Not sure – does not think an Executive **Master’s** would be effective with this. Prefers a certificate program.
- R11 **Certification and “creditation” would be better than a Master’s** degree.
She is not interested in a **Master’s** as she just got her BA – **it’s too much of a time commitment for someone who is more interested in experience at this stage of her career.**

Client-Facing Current Leaders

- R12 A certificate which shows they passed something would be good – the question is what would it be?
- “This could be turned into something big if it works, value often comes later.”
 - “The first CPA probably had very little status or recognition.”

Client-Facing Future Leaders

- R13 Some type of certificate or credential like a CPA - a **Master’s** would take too much time.

4h. What time commitment would be most appropriate and feasible?

Frequency of courses/workshops

Length of time for credential (if applicable)

Non Client-Facing Current Leaders

- R7 Depends on a person’s time availability.
- Young and single – ten hours / week or several nights / week.
 - Married with kids – five hours / week or 1 – 2 nights / week.
- R8 One or two weeks would be preferable. Or a semester long program (three months) but with a 2 - 4 hour per week commitment.
- R9 (Did not ask.)

Non Client-Facing Future Leaders

- R10 A program that lasts for several months because this would give her the time to put ideas into practice, and then get feedback / discuss results with participants in the program.
A full day at the beginning of the program followed by one night a week – or enough so that it remains on the front burner. Need to have regularity to accomplish this.
- R11 The maximum would be two nights / week for a month to get a certification, or some variation like a more intensive week-long course. This would allow her to get a certification in one thing, take a break, and then do it again.
An online certification could be self paced and allow the ability to stretch it out further if needed.

Client-Facing Current Leaders

- R12 Time commitment depends on what you want to accomplish.
- A certificate in forensic accounting entails three months of weekly commitments.
 - A designation that has credibility needs at least a one-month time commitment.

Client-Facing Future Leaders

- R13 15 - 30 days / year is the time commitment for one portion (or track) of their leadership program.
Three days every three months.

5. What would be the pros and cons of such a Center (program, certification, etc.) being housed at a university?

Non Client-Facing Current Leaders

- R7 Pros:
- Credibility.
 - Infrastructure.
 - Access to professors.
- Cons:
- Out-of-town location – travel can sometimes be difficult.
- R8 Pros:
- Name brand.
- Cons:
- Branding confusion with AAM, etc.
- R9 Better to have it at a university with a good reputation. Here, it would be easier to gain acceptance, clients, and students. It gives credibility, more than a freestanding entity.

Non Client-Facing Future Leaders

R10 A university is not important for this – it would not sway her decisions one way or another.
She does not see this as a formal collegiate degree – sees it as extra training that can help marketing people do their jobs well by getting a certificate, etc. Does not need to have a university affiliation or location to be successful.

R11 Pros:

- Convenience.
- Credibility.

Cons:

- Hard to create a separate identity for a certification – much easier to do in a free-standing institute.
- People might be intimidated at looking to a university for just a certificate.

Concern – how would teachers in universities get training – or would you bring in industry experts? Note – this comment is alluding to “real world experience.”

Client-Facing Current Leaders

R12 Pros:

- Having the Center housed at a university would add credibility.

Cons:

- Personal preferences – should choose the most widely accepted university to maximize the number of people who would / could attend.
- May not get some people to teach at a university due to various biases.
- **A university might “get in the way” and feel like they “own the training.”** They may limit the ability to make changes and expand offerings.

Client-Facing Future Leaders

R13 Pros:

- Credibility.

Cons:

- Academic versus real-life.

6. What kind of university would be attractive to you?

Brand name schools versus lesser-known names

Big versus small

State university versus private

Already-demonstrated services-focus versus not

B-schools versus college of professional studies

Non Client-Facing Current Leaders

R7 Brand name vs. lesser known – more prestige.

Big vs. small – no opinion.

State vs. private – no opinion.

Already-demonstrated services focus vs. not – believes the former would be taught by more experienced and discipline-focused faculty. Needs to be high on academic learning scale.

B-school versus college of professional studies – a business school would be better than a liberal arts school.

R8 Prefers reputable institutions with strong brand names vs. lesser well-known schools.

Prefers big vs. small schools.

Prefers private vs. public schools.

Focusing on professional services is great and would be easier to sell – still need to show value, return.

R9 Brand name, most appeal - Dartmouth, Harvard Yale, Northwestern.

Secondary is a business school that's well accepted.

Having a **services focus would help, except schools with those focus areas are not generally well known. You'd have to educate people why a services focus is a good idea.**

Non Client-Facing Future Leaders

R10 Brand name – not important.

Big / small – smaller would be better because it would be more personal and intimate.

State / Private – **doesn't matter.**

Business school (if she had to choose).

- R11 Brand name vs. lesser-known – no difference.
Small vs. big – smaller is better due to student / teacher ratio.
State vs. private – a state university will be cheaper – lower cost would make a big difference, and it would be available to more people.
Already demonstrated service focus vs. not – this would increase credibility.
B School versus college of professional studies.
- Would be more willing to go to B school because faculty are more focused on business and industry trends.
 - **Doesn't understand what a college of professional studies is** – is this a trade school where you go for technical studies?
- Note that type of school does not matter as much for certificates – makes a much bigger difference for degrees.

Client-Facing Current Leaders

- R12 Brand name vs. lesser known – Brand name is better unless you could market a smaller more boutique perspective – getting this type of credibility might take a while to develop.
Size – **doesn't matter, the program matters more.**
- **Large universities usually have more bureaucracy; smaller ones are more flexibly and can mold to customers' needs.**
- State vs. private – no opinion. It depends how much control such an organization exercises over the program.
Already-demonstrated services focus – better than not.
B-School vs. college of professional studies – B Schools would be better because they already have existing infrastructure (vs. building it from a grass roots perspective).

Client-Facing Future Leaders

- R13 Brand names versus lesser known - would add credibility, especially if it was a more business-oriented school.
Big versus small - **doesn't matter.**
State versus private - **doesn't matter.**
Already demonstrated services focus - very important.
B-school versus college of professional studies - business schools have more credibility and can teach leadership / management more effectively.

7. What would be the pros and cons of such a Center (program, certification, etc.) being located in a big city (probe for Boston, Chicago, DC or NYC?)

Non Client-Facing Current Leaders

R7 Pros:

- Easier access to businesses, people.

Cons:

- None.

R8 Location is important – big cities have flight accessibility and varied options for stay.

R9 Being in a big city has a number of advantages. 1) Transportation access 2) lot of people like bigger cities because they realize there are other things to do – enjoy the city and 3) big city has cachet. A major business city has credibility. University choice is more important than the city itself.

Non Client-Facing Future Leaders

R10 Pros

- Ease of transport, easier to get to, etc.
- Bigger student base.

R11 Pros:

- Accessibility, credibility – the likelihood of a center evolving into something bigger is greater in a big city.

Cons:

- Competition from other institutes.

Client-Facing Current Leaders

R12 Big cities would be good because people want to go to them; there are lots of social activities and things to do. Geographically – they will fly people to attend great programs.

Client-Facing Future Leaders

R13 Pros:

- Lots of people can attend given location.

Cons:

- **May not be able to get people to focus if they're working full time in a city with lots of distractions.** Must get them outside of their normal routine.

8. Do you have any final thoughts?

Non Client-Facing Current Leaders

R7 This would help the AAM push their agenda.

R8 Professional services marketing has gone from an afterthought to a great profession over the past 20 years – firms see huge value in this.

It used to be one small part of marketing courses – now entire courses or tracks need to be dedicated to it.

An institutionalized credentialing program could be linked to other schools that do not have it - this could be patented and sold to universities nationwide.

Take a look at www.therainmakeracademy.com. Troy Waugh is the founder.

- It offers marketing training for CPAs and could potentially be used as a partner for content. An institutionalized credentialing program could be linked to other schools that do not have it - this could be patented and sold to universities nationwide.

R9 Business Marketing Association (BMA) may be a target for research and may be a competitor for a certificate.

Business Marketing Association might like to know the results of this research, and could be a feeder for a professional services leadership center.

Non Client-Facing Future Leaders

R10

- R11 Cost is important – firms may or may not pay for this, need to establish value and importance for people at the staff level.
Will there be any type of scholarship to go along with this?
Would smaller local firms find value in this? Would they want to hire these people?
What about creating a job board associated with it – **once you're there, you have access to these employers, and they are interested in you!**

Client-Facing Current Leaders

- R12 This is an exciting idea and sounds like things going on in other industries.
- High technology companies often do things like this – Meridian Technologies in Jacksonville attracting college graduates who go through a similar kind of center, and then get hired.
 - IBM, Arthur Andersen had similar ideas and centers.
 - Ernst and Young used to send professionals to NYU.
- He likes knowledge centers and think-tanks.

Client-Facing Future Leaders

- R13 Great idea - there is nothing like this available now, people will eventually see the benefits even though most are more absorbed in growing the bottom line.

9. Do you have any questions for me?

Non Client-Facing Current Leaders

R7 No.

R8

R9

Non Client-Facing Future Leaders

R10

R11 Her boss – Rebecca Best – wants to be interviewed.
Wants to get summarized information from this survey.

Client-Facing Current Leaders

R12 No.

Client-Facing Future Leaders

R13 No.



**Research on Professional Development
in U.S.-based Professional Service Firms**

Architecture, Engineering & Construction Sector



ExpertiseMarketingSM

**Suzanne Lowe, President
Expertise Marketing LLC
March 2011**

Respondent Number	Interviewee	Date of Interview	Profession	Firm Size	<i>Non Client-Facing (Marketing, Human Resources, Finance, etc.)</i>	
					Current Leader	Future Leader
R1	Kevin Hebblethwaite, CPSM Marketing Consultant Former CEO of EDI 770.401.4797 Kevin@Hebblethwaite.net	9/1/2010	Engineering	Small Boutique	X	
R2	Donna Jakubowicz, FSMPS, CPSM Barton Malow Company 26500 American Drive Southfield, MI 48034-8258 248.436.5502 donna.jakubowicz@bartonmalow.com	9/14/2010	Design Construction	Medium-Sized National Firm	X	
R3	Large Construction Company	8/30/2010	Construction	Large National		X
R4	Jenifer Johnson Senior Associate Thornton Tomasetti 101 NE 3rd Avenue #1170 Fort Lauderdale, FL 33301 954.903.9340 jjohnson@thorntontomasetti.com	8/30/2010	Engineering	Large Domestic Mid-Sized Global		X

					<i>Client-Facing (central to the product/service firm offers)</i>	
					Current Leaders	Future Leaders
R5	Craig Galati, AIA Lucchesi Galati	9/10/2010	Architecture	Small Regional	X	
R6	Project Manager AMT Engineering	10/9/2010	Engineering	Large Regional		X
AEC1	David Kipp Sr. Vice President & COO Ross & Baruzzini 6 South Old Orchard St. Louis, MO 63119 314.918.8383 dkipp@rossbar.com	10/27/10	Engineering Architecture Construction	Small Firm	X	

Professional Development Environment

2. Does your firm make available to you any kind of formal program so that you can grow your skills in marketing, business development or leadership?

Non Client-Facing Current Leaders

R1 Not formally.

R2 Yes.

Non Client-Facing Future Leaders

R3 No, not for marketing professionals - there is a formal internal training program for project staff.

This program primarily focuses on construction and operations but includes a broad array of course offerings, some of which are of interest to the marketing staff.

Marketing professionals largely seek outside providers when they need training in these areas but are encouraged to take project training with the formal internal training program to become familiar with the industry and how the company operates.

- SMPS is a preferred provider of programs.

R4 No formal program for marketing. But currently creating in-house curriculum.

Client-Facing Current Leaders

R5 Yes.

AEC1

Client-Facing Future Leaders

R6 No - all PD is related to engineering discipline.

1a. What types of professional development is made available to you?

Non Client-Facing Current Leaders

- R1 Firm-sponsored PD or training curriculum – use outside providers including:
- Professional association memberships – there are a variety that offer courses and programs.
 - SMPS – **he’s on the national board and takes courses and programs as needed.**
 - Other a la carte offerings:
 - Lots of generic industry programs available with good content.
 - He would consider, but has not used the following:
 - **PSMJ’s Principles Bootcamp** (www.psmj.com) – Newton, MA based engineering / architecture training firm.
 - **Zweig White** (www.zweigwhite.com) – leadership, general business management services and information for engineering / architectural industry.
 - Firm-sponsored Mentoring Program – Have an informal mentoring program.
 - Executive Coaching – Have used Renaissance Executive Forums (www.executiveforums.com) – they are a traditional executive forum that uses a round table format – 12 people per table, lots of one / one interaction.
 - MBA and other **Master’s** degrees – they contribute \$2,500 annually on a case by case basis.
 - Executive education – **Don’t use but is aware of:**
 - PSMJ and Zweig White.
 - Would consider non-industry specific executive education (i.e. marketing, leadership, etc.) to be of a lower priority than industry-specific education.
 - Industry-specific programs of 3 – 5 days in duration can be beneficial.
 - Certificate or Certification Program – **thinks the SMPS’s Certified Professional Services Marketing (CPSM)** is great, there are not too many others.
- R2 Firm-sponsored PD or training curriculum –
- Barton Malow University has the following tracks:
 - Marketing - there are 7 - 8 classes that are specific to marketing and customer satisfaction. Employees get a certificate of completion after finishing - **it’s open to all employees.**
 - Leadership - targeted to specific employees both existing and emerging talent.

Firm-sponsored Mentoring Program – **Yes, they have a strong firm sponsored internship program called the “Best Buddy”** program. This is focused on new hires - they are given a mentor that has recently passed through the system and is closely related in age. Also have a mentor program that includes older mentors providing guidance for younger professionals.

Executive Coaching – They have used outside consultants in the past for this.

MBA and other **Master's** degrees – They currently do not offer tuition reimbursement given the economy (but used to and probably will again eventually).

Executive education – She went **through the Ross Schools of Business' Management Program and received a certificate for a 40-hour one-week program**. Ross has several other offerings including a Leadership Skills Program, Negotiating, etc.

Certificate or Certification Program -

- SMPS certification program.
- LEED accreditation exams from the USGBC for technical skills.

Non Client-Facing Future Leaders

R3 Firm-sponsored PD or training curriculum – Not for marketing folks, primarily use outside providers.

Firm-sponsored Mentoring Program – Yes, have an in-house program (for project staff – unclear if this extends to marketing staff). All new hires spend the first 18 months going through a rotational program which includes a mentor. This mentor relationship often goes longer than 18 months.

Executive Coaching – No.

MBA and other **Master's** degrees – Yes, they send people for **Master's** degrees that are relevant to the job on a case by case basis.

Executive education – Yes, sometimes send people to one week courses similar to the Harvard Extension School offerings.

Certificate or Certification Program - Yes, they encourage:

- SMPS - Certified Professional Services Marketing program.
- PRSA - Public Relations Society of America - have a program.

R4 Firm-sponsored PD or training curriculum – None.

Firm-sponsored Mentoring Program – None.

Executive Coaching – None.

MBA and other **Master's** degrees – the company is good at educating engineers; most of them already have **Master's** degrees. Have a program for technical skills for engineers.

Executive education – Yes, have sent people to the FMI Management Class (www.fminet.com) on an ad hoc basis.

Certificate or Certification Program – Yes, firm sponsors and supports SMPS programs if they have value and the individual is interested.

Client-Facing Current Leaders

R5 Firm-sponsored PD or training curriculum –

- They encourage people to go to the AIA, SMPS, the USGBC and other professional associations - this is a large portion of their PD.
- Also have in-house PD programs that vary depending on the needs of the company - they have programs that rotate on a monthly basis. Quality control and leadership practices are examples.
- Also go to various seminars offered at other institutions.
- Advanced Management Institute (AMI) - is a subsidiary of FMI (www.fmi.net), is focused on the architecture and engineering industry, and is a degree program. He is a faculty member and has access to other adjunct faculty whom he brings in to teach seminars.

Firm-sponsored Mentoring Program – No, they try to do it but not formally. **They haven't figured out how to do it in a small and informal firm atmosphere.**

Executive Coaching – **Yes, it's part of the leadership structure.** Similar to mentoring, it entails informal relationships.

MBA and other **Master's** degrees – Yes, they have funded degree programs including **Master's** in Architecture, MBA and **Master's** in Sociology.

Executive education –

- The partners do self-directed studies and readings - if they find a program that makes sense, they go to it. There are none that stand out other than the USGBC and the AIA. They also need to consider keeping their licenses current through CEUs.
- Books he recommends related to leadership and management:
 - Built to Last, Good to Great
 - 7 Habits of Highly Effective People
 - The Living Company
 - Building the Bridge as You Walk On It
 - Discovering the Soul Service

Certificate or Certification Program -

- CPSM through SMPS - their marketing people do this.
- Also do LEED and other licenses that are more related to technical skills.

AEC1 Primarily relating to the actual practice of the profession. Engineering and architecture. A lot has to do with continuing certification. The rest has to do with additional certification for project management or LEED.

Ninety percent technical.

Client-Facing Future Leaders

R6 Firm-sponsored PD or training curriculum – Not really.

- No formal training program.
- The firm encourages involvement with local societies and engineering associations.
- They have monthly lunch seminars where vendors talk about new products (not marketing, leadership, etc. related).
- They take courses related to new engineering regulations. They also get PE credits to maintain engineering credentials - more often than not this is related to networking in the interest of generating new business.

Firm-sponsored Mentoring Program – None - it is inherent in day-to-day operations.

Executive Coaching – None.

MBA and other **Master's** degrees – No, and it is not necessarily encouraged by the firm but they do have a tuition reimbursement program.

Executive education – None.

Certificate or Certification Program – None.

1b. Is everyone at your firm given the opportunity to take advantage of the professional development and training offerings?

Non Client-Facing Current Leaders

R1

R2 Yes, but at lower levels (manager and below) they consider it from a budgetary and needs perspective.

Non Client-Facing Future Leaders

R3 Yes.

R4 They are still trying to determine how to roll programs out to employees.

Client-Facing Current Leaders

R5 Yes.

AEC1 Yes.

Client-Facing Future Leaders

R6 Yes - they are an equal-opportunity firm.

1c. If your firm conducts its own professional development or training, why might you seek or request an outside provider like an industry organization, university, etc.?

Non Client-Facing Current Leaders

R1

R2 They would consider outside help when they can't take the time to create or have the expertise internally. All courses are taught by the CMO and her for the marketing track. Not sure about the leadership track.

Non Client-Facing Future Leaders

R3 Considerations - the construction industry is centered around constructors. There has been a shift away from hard bidding (government contracts where the low bidder wins based solely on price) to qualifications and best value. They need to know how to better present the case for the latter scenario - these skills are not intuitive to the industry and need to be acquired from outside providers.

R4

Client-Facing Current Leaders

R5

AEC1 We are trying to package our own offering. Baby steps. First time trying this. The skills that are required to be offered are not available inside. We would go outside because we take away from our people's time to do client work. And lead the firm.

Client-Facing Future Leaders

R6 He might see outside providers - "to make more money or for career advancement." He is thinking about getting his PMP (Project Management) certification for these reasons.

1d. If your firm uses an outside provider like a university, why did your firm choose this particular type (of university)? What factors are important?

Non Client-Facing Current Leaders

R1

R2 The Ross School was chosen based on its location and reputation.

Non Client-Facing Future Leaders

R3

R4

Client-Facing Current Leaders

R5 They prefer organizations they already belong to because they have similar values and the content is relevant to partners' and others' career tracks.

They select programs on a case by case basis if they are relevant.

AEC1 Have not used a university. We have used outside consultants, and certifying agencies. Outsiders used to be extremely relevant to what we are trying to accomplish. Say we are looking for strategic planning assistance. We will look for a consultant that has strategic planning expertise in the professional services market. Or business development -- we would go to an outside source. Relevant expertise in our business.

Client-Facing Future Leaders

R6

1e. Have you pursued your own pathway to grow your skills in marketing, business development or leadership?

Non Client-Facing Current Leaders

R1 He has primarily used the SMPS for this.

R2 Yes, this is a huge part of her growth. She has taken classes on her own and completed a degree on her own. She has attended SMPS programs and uses the SMPS for networking and visibility as well.

Non Client-Facing Future Leaders

R3 Yes.

- R4 Yes, from a personal basis, she has plan that involves three facets and believes that you need a plan for life to be successful.
- Business plan for professional development within the industry.
 - Personal plan for management and communication skills.
 - Community growth plan to give back to the community.

Her best experience has been with SMPS – (from an educational standpoint) and finds it extremely valuable.

- Been to 16 national conferences in a row and 10 – 15 regional conferences and has been on organizing committees for some of these conferences.

Leadership Broward (www.leadershipbroward.org) – This is a state / county program that runs a nine-month leadership program (one day / month) that allows people to get more involved with the community.

Client-Facing Current Leaders

R5 He joined the SMPS in 1979 very early in his career - he spent some time in marketing functions and attended national and local meetings.

"Spirit at Work" from the University of New Haven - **this program focuses on engaging people's hearts to help engage them with their work from a spiritual perspective.**

He also speaks at lots of events as part of his consulting work.

AEC1 Yes. I have done this two ways: first through consulting firms like Zweig White. Also engaged with a smaller firm called Congruence. And also get acquainted with people like Suzanne Lowe. Intentionally search out the marketplace of ideas for people who deal with professional services. To get their take on things.

Client-Facing Future Leaders

R6 See above.

1f. What has driven you to pursue your own pathway? What do you hope you can gain from pursuing your own skills growth avenues?

Non Client-Facing Current Leaders

R1

R2 Enhanced job satisfaction, pride in work, increased job responsibilities, promotion, pay, etc.

Non Client-Facing Future Leaders

R3 Wants to help her company grow and wants to do a better job. She has pursued these avenues on her own and the company encourages it.

R4 To be seen as a leader based on the industry based on her skills and the value she brings to the job and industry. Long-term goals are in leading the business development group (CBDO) with global responsibilities.

Client-Facing Current Leaders

R5 He has an internal drive to expand his knowledge base and become a better leader.

AEC1 In our business we are educated in our technical disciplines. We are not educated in the practice of leading, managing and prospering a PSF. My motivation: How can the best ideas be brought to bear on improving our own firm? There is a dearth of information out there. That's why I scrounge around for ideas out there.

Client-Facing Future Leaders

R6 See above.

1g. What avenues are you pursuing / did you pursue? Who provided this training?

Non Client-Facing Current Leaders

R1

R2

Non Client-Facing Future Leaders

R3 CPSM program with the SMPS.

R4

Client-Facing Current Leaders

R5 See above.

AEC1

Client-Facing Future Leaders

R6 N/A

1h. How important to you is a formal degree or certificate? Why? What do you hope will happen once you have your degree or certificate?

Non Client-Facing Current Leaders

R1 Important. He is a business leader trained in sales and marketing. In some states he could not be President and CEO of an engineering firm without the requisite engineering, etc., degree – from this perspective, any type of degree or certificate would be beneficial. Any executive in a senior leadership position in a professional services firm like engineering, legal, etc., needs a degree or certificate to have the credibility to get there in the first place.

R2 Very important in marketing - **it enhances one's credibility**. In this industry, marketing work is considered an offshoot to secretarial work - **she is surrounded by "registered" professionals (i.e. professionals with technical accreditations, etc.)**.

She was promoted after participating in an SMPS program and was additionally recognized by her boss and others.

Non Client-Facing Future Leaders

R3 Certificate is not as important as what you learn and the process of learning it.

R4 The degree is what gets you the interview - **experience is what's important**. The certificate that SMPS offers is good and her company supports it – but she believes that you can get these skills from courses, not necessarily certificate courses.

Client-Facing Current Leaders

R5 The outside marketplace puts a higher value on degrees and certificates than they do internally. Learning is more important than certificates - **he doesn't pursue** certifications.

AEC1 It does have traction. I am not sure if the degree is as important as the immersion in the knowledge. But if I were offered it, I would jump on it in a heartbeat. And participate as a student or instructor or both. It's beneficial to me and my career and to the firm. Having a degree or certificate might not be as important, but the content, the immersion is more important.

Client-Facing Future Leaders

R6 A formal degree or certificate might help the company but is not as important for professionals in his position. The only certificate that matters is the PE certification (Professional Engineering) - this made a big difference for him.
His thoughts related to other types of certificates and degrees might change as he moves along in his career - but at his level - the only one of importance is the PE certificate.

1i. Did your firm pay or would they pay for or reimburse you for pursuing your own pathway to grow your skills?

Non Client-Facing Current Leaders

R1

R2 The firm pays but reimbursement is considered at the group level where budgets and needs are considered.

Non Client-Facing Future Leaders

R3 Firms pays.

R4 They will probably pay if there is value and it is a trusted program – but these considerations are still under development.

Client-Facing Current Leaders

R5 Yes, and they pay for memberships in professional associations.

AEC1 Yes.

Client-Facing Future Leaders

R6 There is some tuition reimbursement if related to the job.

1j. What outcomes do you believe are prioritized for professional development by the firm? What do you think the firm is hoping that employees get out of the professional development and training opportunities?

Non Client-Facing Current Leaders

R1

R2 Greater knowledge and expertise will help the firm win additional work and grow.

Non Client-Facing Future Leaders

R3 Firms prioritizes more skilled and productive employees, a more knowledgeable workforce and a better provider of value for clients.

In doing the above, the firm will realize efficiencies.

R4

Client-Facing Current Leaders

R5 Learning can be translated into something relevant to help grow their knowledge base as a whole, and the firm's on a collective basis.

AEC1 They would want my best thinking and current available leadership and management of the firm.

Client-Facing Future Leaders

R6 The firm hopes employees will be able to generate additional business, especially with repeat clients - they believe that small jobs often turn into big jobs.

Professional Development - Opinions

[NON CLIENT-FACING: Some professional and business service leaders have told us that firms will increasingly seek some kind of recognized credentials from their nonrevenue-generating leaders in marketing, business development, operations, finance, HR or IT.]

2a. What is your opinion of this statement?

Non Client-Facing Current Leaders

R1 Would be a great way to filter resumes.

Not sure how to answer this question – “if people are valuable, we’ll send them to get this certificate or put them through the program.”

This type of question is too subjective but the debate goes as follows – if someone in the firm is valuable to the firm, why would we need to send them to get a certificate? Gaining internal skills and experience is somewhat just as valuable in their own right than outside credentials. Determining whether individuals with great internal skills are more valuable than individuals with certificates can be measured in lots of different ways – you have to analyze each individual situation to see who is more valuable. When deciding to promote someone to run a group – they must have experience in running a group, not necessarily a certificate that gives them the credentials to run such a group.

R2 **“I agree.”** She looks for degrees and certifications when she hires staff - she considers this as additional drive or effort that will be reflected in their work at the firm. She specifically prefers SMPS certifications and knows that if they passed this exam, they must have a certain level of expertise and will take less time to train.

Non Client-Facing Future Leaders

R3 True statement. This will make employees better at what they do and create efficiencies for the firm. This is already happening through her own firm’s encouragement of PD and its willingness to invest / pay for training.

R4 **Don’t agree. We will hire the most valuable individual, and if they have credentials that may ‘seal the deal’ that is great but that would not be the basis for the hirer.**

This type of certificate may distinguish mediocre performers from others that don’t have it and may give them more potential.

2b. Would this increase your likelihood of seeking an additional credential?

Non Client-Facing Current Leaders

R1

R2 Yes.

Non Client-Facing Future Leaders

R3 Yes.

R4 Maybe - If the program adds value, is endorsed by people she likes and respects, and will provide cutting-edge skills. SMPS certificates – “CEUs equate to having a quota to fill” – she wants value out of a CEU program and does not want to go through the mechanics just to stay certified. Value is the bottom line.

[CLIENT-FACING: Some professional and business service leaders have told us that their firms will increasingly seek practitioner-managers whose credentials set them apart from “home-grown” leaders.]

3a. What is your opinion of this statement?

Client-Facing Current Leaders

R5 These firms must not have as strong a corporate culture as his. His firm puts great emphasis on culture - it is hard for him to imagine finding future leaders from the outside - institutional knowledge is extremely important in this firm.

AEC1 Very forward thinking view. Leaders who adopt this view are likely to prosper in the future.

Client-Facing Future Leaders

R6 A formal program could help but homegrown knowledge and mentoring is of the greatest importance, especially at his firm. A formal program could help some engineers with areas of weakness.

3b. Would this increase your likelihood of seeking an additional credential?

Client-Facing Current Leaders

R5 Hard to say - the clients they seek do not focus as much on credentials than they do experience and relationships. If their clients were to focus more on credentials, he might consider placing more emphasis on them.

From a philosophical perspective - **he doesn't believe you get additional work from additional credentials. It's more related to how he connects with people to help them solve problems. If you are able to do this, the clients don't care about your credentials.** However, learning that goes along with credentials is essential - this knowledge is more important; the certificate is of secondary importance.

AEC1 Yes.

Client-Facing Future Leaders

R6 Yes, but he would need to see other people doing it first and see positive results as a result. As a younger career professional - he would need to see someone (i.e. his boss or executive level professionals) pave the way.

Another consideration is that if there was some type of requirement for this type of certification included in RFPs that they receive - this would be a clear motivation for the firm to send individuals to get such a credential (i.e. the RFP requires that in order to bid on a project - the firm must have a certain number of professionals with this type of credential).

Cross-Sector Institute Discussion

The creation of a cross-sector Center, Institute, executive education course, certification and/or graduate degree program on professional services leadership (i.e., competencies to more effectively direct, steer, manage and/or grow a professional or business service firm, including marketing and selling). This type of Center would be aimed at anyone who has or desires to gain decision-making responsibilities for the firm's growth, competition and survival.

A Center like this could:

- **...offer an array of choices for growing one's skills: short customized executive education sessions; formal certification credentials; and/or an executive master's degree.**
- **...conduct and/or support cross-sector research, conferences, case studies (and other data) on the emerging and best practices of firm growth, management or leadership.**
- **...be housed at a University, but it might also be free-standing.**
- **...support and/or extend an Association's credentialing and/or research agenda.**

Initial Reaction

Non Client-Facing Current Leaders

R1 Sounds like a no brainer, but lots of work (to put together).

There are not a lot of programs like this, would prefer some type of certificate versus a **Master's** degree.

Was under the impression that there were MBAs with a focus on professional services, or at least MBA programs with a course on professional services. This idea probably goes beyond that.

R2 Sounds like a great idea - kind of like a one-stop shop.

How would it differ from what is offered at the Ross School? Other business schools have programs that address leadership and management.

How would it impact the SMPS programs?

Non Client-Facing Future Leaders

- R3 Sounds like a duplication of what SMPS already offers. This would be valuable if it provided something unique and different in terms of what they could learn versus what SMPS already provides. Needs to be flexible in terms of time demands.
- R4 "Sounds like the University of Phoenix – wants to be all things to all people."

Client-Facing Current Leaders

- R5 Great idea - that is what AMI is. Lots of firm leaders across the country are graduates of AMI - his partner has a degree. Almost all the firms in the San Francisco Bay Area are involved.
- AEC1 Very excited.

Client-Facing Future Leaders

- R6 Would this be one big certification or several smaller certifications that focus on specific disciplines?
He would prefer all of the disciplines / skills mentioned be treated under one certificate versus having to go back and get a separate certificate for marketing, management, leadership, etc.

4a. What elements are most important or attractive?

Non Client-Facing Current Leaders

- R1 Prefers a focus on growth, management, leadership – areas that would make professional services employees more well rounded. Example – this would give him the opportunity to further his credentials in the broader professional services industry. If he ran a "law" firm for X years and wanted to make a change to another type of professional services firm where he didn't have the technical skills of the trade – this type of program might put him at the top of the stack of resumes. This would have value. He has a strong belief that rainmakers will always have more value than their peers regardless of what degrees they have – **rainmakers have inherent skills that can't be learned**. Some individuals will never be rainmakers - the skills included in this type of program can be learned over and over by these people, and it will never turn them into rainmakers – **"lots of this stuff is based on internal hardwiring that you can't do anything about."**
- R2

Non Client-Facing Future Leaders

- R3 Research and case studies describing how to accomplish a goal based on latest industry trends. No one is telling them how to do things - **"you're recreating the wheel"** - wants someone of authority to tell them what / how to do this through case studies.
Sharing best practices among different professional service sectors.
Likes a physical presence.
- R4 Management as a core competency is important as a basis for learning. In most organizations you have people that are good at some things, others good at other things – but if everyone can get good at some of these basic skills like relationship management, leadership, selling, etc. the firm as a whole would be better off. This would help create a common ground among all professionals in the firm and would ultimately enable all professionals to know how to increase profitability on a collective basis.
SMPS – adding this type of program to what they already have could work.
There is an existing group of people that already do this – **can't remember name but it's structured as a 1 – 1.5 year program – three days / month – for \$15,000. It's a "what you put in is what you get out" type of program.**
Aligning with a university could add value.
Can learn things better from outside firms (vs. internal corporate resources).

Client-Facing Current Leaders

- R5 The professional services industry is different and has different needs from a leadership, management and marketing skills perspective. These need to be tailored to the industry - doing this is a great thing.
Hiring someone with a marketing degree is great but it is too broad and does not apply directly to the professional services industry.
- AEC1 The cross sector feature. Definitely # 1 for me.
Focus on leadership knowledge.
The notion of conducting research and facilitation of research.
You mentioned the one: the sponsoring of the cross-industry symposia to share knowledge. This is important.

Client-Facing Future Leaders

- R6 Location / convenience.
Practicality - relevance to his job.
Content - new techniques he would learn.

4b. What elements are least important or attractive?

Non Client-Facing Current Leaders

- R1 A program like this would not do a great job at strength / weakness assessments.
Getting this degree does not enable even the smartest, most credentialed professional services revenue generator to become CEO.
Must consider that anyone who does this is going to have to trade off current work responsibilities with learning time – this is a delicate balance that must be considered.
- R2 Basic job skills, technical skills - **don't need this because employees should already have them.**
Need to have a certain experience level before entering this type of program.
- Employees from smaller firms might need less years of experience to qualify because they get more experience than those at larger firms.

Non Client-Facing Future Leaders

- R3 Having a single physical location to go to is not important.
- R4 Depends on your audience – needs and course content have to be determined according to the different skill sets and levels of experience of the different audiences.

Client-Facing Current Leaders

- R5 None.
- AEC1 Customized executive education course. (Degrees are fine).

Client-Facing Future Leaders

- R6 Not sure.

4c. What else would you like to see included?

Non Client-Facing Current Leaders

R1

R2 Leadership skills like employee management and “how to read others” are subjects of interest.

- Training for how to manage difficult employees including employees with behavioral problems as well as superstars.
- Training for how to deal with executive leadership.

Contract and negotiating skills.

Non Client-Facing Future Leaders

R3

R4 Smart teachers with experience relevant to the AEC industry.

Client-Facing Current Leaders

R5 Flexibility - can't take too much time from the office.

AEC1

Client-Facing Future Leaders

R6 Would like to get some type of take away manual or software that highlights the most important components - something that he could refer back to after the formal part of the program.

4d. What would be a key differentiator that might result in you considering participating in one or many of the services offered?

Non Client-Facing Current Leaders

R1

R2 Travel expenses - would need to consider against local offerings.

Course content - this would drive the decision.

Non Client-Facing Future Leaders

R3 Have to distinguish this program from what the SMPS already does.

R4

Client-Facing Current Leaders

R5

AEC1 I would want it to know that the people behind it and content providers are first rate. I would not have to already know who they are. It has to be a certain amount of each. The people involved would have to be serious practitioners and scholars.

Client-Facing Future Leaders

R6 A key differentiator would be "If the guy sitting next to me is taking the course" - there is a lot of internal competition within his firm and within the industry.

4e. What content areas or topics do you see as being most critical for your professional development?

Non Client-Facing Current Leaders

R1

R2

Non Client-Facing Future Leaders

R3

R4 Presentation skills.

Management training and personal communication skills - oftentimes we need to be able to convince others of a need for change.

Client-Facing Current Leaders

- R5 Marketing should be a key component. **It is a "different animal."** Many people take classes in school but rarely understand business development and public relations. **This industry seems to "throw all these terms under the same umbrella."**
Leadership and management skills are more easily learned on the job.
- AEC1 Human capital.
Attracting and retaining talent.
Unconventional marketing.

Client-Facing Future Leaders

- R6 Topics that would allow him to do his job better.
One example - how to send e-mails - it sounds obvious but there are so many ways to send an e-mail, so many ways to interpret an e-mail - there is no one particular standard. He wants guidance on the subtleties of good vs. bad manners, e-mail composition, etc.
There is a lot of miscommunication and misreading that occurs with e-mail - the real message often gets lost in translation. **"It you can make your point over e-mail, you're ahead of the game - this goes way beyond English 101."**

4f. What delivery formats would you most prefer?

All face-to-face workshops/courses at the employer site.

All face-to-face workshops/courses in a university.

All online.

Hybrid with face-to-face workshops and follow-up online content.

Non Client-Facing Current Leaders

- R1 Prefers traditional classroom based approaches.
EMBA's have used a good hybrid approach – recognizes that some online component is inevitable.
- R2 Face-to-face is best but time and travel would restrict this so some online component might be necessary. The face-to-face portion is most important for group discussion, etc. - online portion has limitations.

Non Client-Facing Future Leaders

- R3 Face-to-face.
Hybrid would work - some universities have video classrooms where an instructor can lecture to many classes at many different locations at the same time. The market overall is moving towards this method of course content delivery (webinar, webcast).
Online - **wouldn't work as well because people are not as engaged, there is not as much interaction.**
Videotapes, DVDs, etc. - **these don't work for similar reasons as online and can be boring.**
- R4 Group interaction is most important – 10 – 15 people is the optimal size – she learns more from group interaction and sharing best practices.
Online – no.

Client-Facing Current Leaders

- R5 **This depends on people's needs** - he likes group activities and face-to-face workshops.
Likes learning from best practices and other industries.
Prefers tangible discussions versus theory.
Theory based discussions can happen in either online or classroom formats.
- AEC1 Hybrid.

Client-Facing Future Leaders

- R6 Face-to-face lectures.

4g. What credentialing, if any, would you consider?

Master's degree

Certificate – what kind?

Other credentials

Non Client-Facing Current Leaders

R1 Certificate over master's.

R2 Certification, possibly a master's degree.
Should be some type of pass / fail exam.

Non Client-Facing Future Leaders

R3 Doesn't matter - the important thing is what you learn.

R4 Depends what you are going to get out of the program.

Client-Facing Current Leaders

R5 Not sure.

AEC1 Master's degree.

Client-Facing Future Leaders

R6 Certificate.

4h. What time commitment would be most appropriate and feasible?

Frequency of courses/workshops

Length of time for credential (if applicable)

Non Client-Facing Current Leaders

R1

- R2 Personal circumstances (like her 6-year old) restrict people's abilities to dedicate lots of time. The 40-hour Ross program she attended was one component of a larger program - 40 hours for this type of program would be too short. If the credential was a **master's**, then a one-year commitment would be appropriate. 1 - 2 days / month plus homework plus online courses is feasible. One day a week would be tough with a full time job - especially in this economy.

Non Client-Facing Future Leaders

- R3 If scheduled coursework - full time for one week would be good, or one night / week for three months. Shorter, more concise programs can be effective in that people are engaged and focused during this time (depending on location) despite the potential travel and lodging costs. Need to consider family, business and social situations - **can't do it during kids' spring breaks, the local construction conference, etc.** Shorter, well-timed concise programs could avoid this.
- R4 The Leadership Broward program as described above this represents a commitment that is well worth it. One hour / week for any duration is not enough; **people aren't able to focus on it.** One-week programs are harder to sell to employers – **Thursday through Saturday programs might be an easier sell because "it's so important you're giving up a day of your weekend."**

Client-Facing Current Leaders

- R5 Evenings, weekends. There should be enough time in between sessions so that people can apply what **they've learned**. Prefers monthly sessions over a 3 - 6 month period for this reason. Weekly sessions could also work.
- AEC1 The frequency should be monthly. A year to 18 months.

Client-Facing Future Leaders

- R6 This depends on the degree of difficulty and level of prestige of what will be offered.
The PE certificate is three months in duration with 15 hours a week of time requirements - this includes three-hour classes, three times per week with weekend / weeknight study comprising the rest.
He would suspect that this type of program would not be as intensive - this should be similar to the PMP certificate which is four full days over two weeks.

5. What would be the pros and cons of such a Center (program, certification, etc.) being housed at a university?

Non Client-Facing Current Leaders

- R1 Would provide a good platform for this.
Industry would respect this type of program more if it came from a degree-granting university.
- R2 Pro:
▪ Prestige.
- Con:
▪ Location.

Non Client-Facing Future Leaders

- R3 A single location would be easier to administer and would avoid the costs and complications of travel.
Many companies are more likely to support reimbursement for university courses as this is more traditionally accepted (than if education comes from private institutions).
- R4 Pros:
▪ Prestige.
- Cons:
▪

Client-Facing Current Leaders

R5 A university would give it credibility and would be helpful in getting people to attend. It would also enable the program to tap into a higher level of research.

Brand name schools are of lesser importance - **"I am not an educational snob."**

Big / small schools - not important. What is more important is the size of the classroom - smaller is better as it is more intimate.

AEC1 Pro:

- You could build on the foundation authority there. A lot of universities sponsor centers of one kind or another. You have a built in infrastructure. Plus access to knowledge generally and research.
- It establishes legitimacy in the minds of the buyer.

Con:

- Universities can be difficult environments to deal with -- the faculty often have all sorts of interior conflicts that prohibit stuff like this from getting done. Kingdoms, egos, other pathologies.

Client-Facing Future Leaders

R6 Pros:

- Convenient location, nice classrooms and nice learning environment.

Cons:

- University traffic and parking can be problematic.

6. What kind of university would be attractive to you?

Brand name schools versus lesser-known names

Big versus small

State university versus private

Already-demonstrated services-focus versus not

B-schools versus college of professional studies

Non Client-Facing Current Leaders

R1 Doesn't matter but slightly prefer a higher quality university because of the perceived value of degree or certificate.

R2 Brand name school - this would carry weight in her business.

Big / small - **doesn't matter**.

State / private - **doesn't matter**.

Business schools would add additional credibility but it depends on the reputation of the school within the industry.

Non Client-Facing Future Leaders

R3 Brand name better - especially for people looking for / changing jobs.

Big / small - **doesn't matter**.

State vs. private - **doesn't matter**.

Already focus on professional services - this would be good because there would be efficiencies, great knowledge transfer, good lessons learned, etc. so that you don't have to "recreate the wheel."

R4 Brand name.

Size – **doesn't matter**.

Private.

Client-Facing Current Leaders

R5

AEC1 Two stick out: A demonstrated commitment to some kind of services research and education. The other is the business school -- preferred. I think it has a better adjacency to what I need to know. Other attributes are lesser concerns.

Client-Facing Future Leaders

R6 Brand name looks better on your resume but wouldn't matter for him.
Bigger state schools are better due to location and convenience factors.

7. What would be the pros and cons of such a Center (program, certification, etc.) being located in a big city (probe for Boston, Chicago, DC or NYC?)

Non Client-Facing Current Leaders

R1 Doesn't matter.

R2 Cities have more travel options and easier access including flights, lodging, etc. Travel to a city could be paired with business reasons. Easy access is optimal.

Non Client-Facing Future Leaders

R3 Pros:

- Travel costs would be less if you live there as most cities are hubs for some airline.
- Greater variety in lodging.
- More opportunities for social interaction and mixing in a vacation / weekend.
- Could create licenses with different institutions (not necessarily a university) nationwide so that there would be proximity to major population centers. Could do it online too.

Cons:

- Bigger cities are more expensive.

- R4 Pros:
- Ease of access.
 - Lots of places to stay.
 - Make a weekend / vacation out of it.
- Cons:
- Expensive.
 - Distractions – sometime lose out in the networking because people disappear.

Client-Facing Current Leaders

- R5 Pros:
- Easy access, good accommodations.
- Cons:
- Could be too east- / west-coast based.

- AEC1 Pros:
- It is easier to get to. Assuming that some of this stuff is done face-to-face, it will be harder to get to remote locations. A lot of professionals like me would like to try to combine travel with professional work.

Client-Facing Future Leaders

- R6 He would prefer going into a city for this - he is located in the suburbs. A city would make the program more fun and vibrant. Traffic and parking is a negative.

8. Do you have any final thoughts?

Non Client-Facing Current Leaders

- R1 Students graduate from college and don't necessarily want to go work for professional services firms.
- They get into these firms based on parents telling them to do it, prospects of being "heads of the universe", etc. They are egotists that want to design the tallest building in the world, etc.
 - The skills they lack are the skills that are needed to grow the firm including:
 - Delegation.
 - Ability to leverage relationships.
 - Relationship management – client satisfaction without being 100% involved.
 - Etc.
 - Georgia Tech helps fill this gap with marketing and leadership programs – they have very popular courses that help deliver this type of content that help professionals gain skills they need to grow firms (he is a guest lecturer in these classes).
- "The first one to the game will win."**
- There are no programs that encompass all professional services now.
 - Georgia Tech could be a great example.
 - They have a great nexus of technical and managerial skills.
 - Should talk to these institutions to get ideas.
- R2 The SMPS National Board partnered with FMI leadership.
AGC – Association of General Contractors - their members might be interested.

Non Client-Facing Future Leaders

- R3 Reiterates the point that this concept must complement what the SMPS already provides and the need to offer relevant content.
- R4 Not sure where this is going. SMPS does a good job with lower- to mid-level management – provides a good way to get toward middle management.
There is a missing piece of education that needs to really "wow" someone in her position and advance her to more senior levels.

Client-Facing Current Leaders

R5

AEC1 The Ewing Kaufman Foundation – Kansas City. Dedicated to sponsoring innovators and entrepreneurs.

Client-Facing Future Leaders

R6 No.

9. Do you have any questions for me?

Non Client-Facing Current Leaders

R1 Would like to hear summary feedback.

R2

Non Client-Facing Future Leaders

R3

R4

Client-Facing Current Leaders

R5

AEC1

Client-Facing Future Leaders

R6 Would like to hear how it turns out.



Research on Professional Development in U.S.-based Professional Service Firms

Executive Search Sector



ExpertiseMarketingSM

**Suzanne Lowe, President
Expertise Marketing LLC
March 2011**

Respondent Number	Interviewee	Date of Interview	Profession	Firm Size	<i>Non Client-Facing (Marketing, Human Resources, Finance, etc.)</i>	
					Current Leader	Future Leader
R27	Teri Schram Head of North America Marketing and Communications Egon Zehnder International One North Wacker, Suite 2300 Chicago, IL 60606 312.260.8955 Teri.Schram@ezi.net	10/19/2010	Executive Search	Large Firm	X	
					<i>Client-Facing (central to the product/service firm offers)</i>	
					Current Leaders	Future Leaders
R28	Small Executive Search Firm	12/01/2010	Executive Search	Small Firm	X	

Professional Development Environment

1. Does your firm make available to you any kind of formal program so that you can grow your skills in marketing, business development or leadership?

Non Client-Facing Current Leaders

R27

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

1a. What types of professional development is made available to you?

Non Client-Facing Current Leaders

R27 No they don't have specific programs that they serve up to me or offer to me. They do have it for the consultants' role. But not for my role. But they have been open to me enrolling in courses, say, on digital marketing. They do pay for me to join a CMO Roundtable or other professional orgs. It's at my own initiative, though.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28 There is an opportunity to take core programs at the Association of Executive Search Consultants (AESC) for junior people. These courses are about the basics of undertaking executive search. Nothing about managing the firm.

For our senior people – NO, we do not offer formal programs. This is a family-owned business. My only training on search was a three-day course on managing a professional services organization, offered by Harvard Business School. I took it 1994. It was only for three days, but it was great. It cost more than my entire undergraduate education. It was very good. It is my mini bible. They had materials, case studies.

Client-Facing Future Leaders

1b. Is everyone at your firm given the opportunity to take advantage of the professional development and training offerings?

Non Client-Facing Current Leaders

R27 I think yes, for the research group – these are folks that do lot of the work about understanding the industries or marketplace for our talent mapping work. These people do have some internal training courses on how to do research better, and use the tools more effectively. Like LinkedIn. But other staff roles like EAs or financial analysts, no.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

1c. If your firm conducts its own professional development or training, why might you seek or request an outside provider like an industry organization, university, etc.?

Non Client-Facing Current Leaders

R27 They are a combo of in-house trainings like for the research function. But also they have sent consultants or industry knowledge managers to offsite programs to use, say, LinkedIn.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

1d. If your firm uses an outside provider like a university, why did your firm choose this particular type (of university)? What factors are important?

Non Client-Facing Current Leaders

R27 No, we bring people in-house, not a university per se. They do training for partners on how to sell, how to close, build your own personal brand. Not professors.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

1e. Have you pursued your own pathway to grow your skills in marketing, business development or leadership?

Non Client-Facing Current Leaders

R27 MBA with concentration in economics and finance.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

1f. What has driven you to pursue your own pathway? What do you hope you can gain from pursuing your own skills growth avenues?

Non Client-Facing Current Leaders

R27 I had been out of work force for five years. I was getting back in and I felt that I was disadvantaged because my competition was five years younger. The MBA at that time was considered the gold standard.
I got tuition reimbursement from my company.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

1g. What avenues are you pursuing / did you pursue? Who provided this training?

Non Client-Facing Current Leaders

R27 Illinois Institute of Technology.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

1h. How important to you is a formal degree or certificate? Why? What do you hope will happen once you have your degree or certificate?

Non Client-Facing Current Leaders

R27 It was off the charts important, had to have it.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28 I am a lawyer; I already have all the credentials I need. It was going to be on the job training. But in my organization, if I was going to sell the firm, I would send my heir apparent to the HBS executive course, if there was such a program. There is no program like that, but this is not rocket science. Running a professional service firm does have some craft to it, but **that's something you can learn from lots of conversations in your network. I have friends who run their own firms. I have a posse like me.** For example, the former CEO of [prominent management consulting company]. We sit around and talk about (for example) what should be our office rent or what is a fair ratio of rent to sales or what you pay for a COO.

Client-Facing Future Leaders

1i. Did your firm pay or would they pay for or reimburse you for pursuing your own pathway to grow your skills?

Non Client-Facing Current Leaders

R27

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

1j. What outcomes do you believe are prioritized for professional development by the firm? What do you think the firm is hoping that employees get out of the professional development and training opportunities?

Non Client-Facing Current Leaders

R27 GATX thought they were going to get – one of my final **projects was going to be a paper independent study... I wanted something to research.** I went to our HR dept and asked to research GATX and its policy on tuition reimbursement for MBAs. I was asked to understand their motivation for reimbursing their people for MBAs. I asked what they wanted to get out of it! Promotion? They had no statistics! I saw that people would get their MBA and leave within a certain time. They had no goal for paying for MBA. We did get a note from the chairman for achieving **an MBA. But they offered no upward mobility and they didn't track this.** No obvious move up the ladder. They were slow to analyze this. Their reimbursements were paid on a sliding scale. A= 100%. B = 90% etc.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

Professional Development - Opinions

[NON CLIENT-FACING: Some professional and business service leaders have told us that firms will increasingly seek some kind of recognized credentials from their nonrevenue-generating leaders in marketing, business development, operations, finance, HR or IT.]

2a. What is your opinion of this statement?

Non Client-Facing Current Leaders

R27 I disagree. I am not seeing this. I'm not hearing it. Only based on my limited scope of exposure to marketing people. But I do know lots of marketers who are looking for jobs. I get a daily e-mail about every marketing job that's open in Chicago. I am not seeing these position descriptions asking for additional credentials. Mostly ask for expertise in digital arena, and the ability to understand customer buying analytics. Now if that's part of a credentialed program, one could argue that's what they mean. But it's not explicit that they are asking for some kind of degree.

But yes it often says bachelors' required, and master's preferred.

Non Client-Facing Future Leaders

2b. Would this increase your likelihood of seeking an additional credential?

Non Client-Facing Current Leaders

R27

Non Client-Facing Future Leaders

[CLIENT-FACING: Some professional and business service leaders have told us that their firms will increasingly seek practitioner-managers whose credentials set them apart from “home-grown” leaders.]

3a. What is your opinion of this statement?

Client-Facing Current Leaders

R28 There is already the tradition of having a managing partner and a non-lawyer run a law firm. The big firms have had to have those. I am pretty familiar with the big four Executive Search firms. If you look at the guys who are running those businesses, they are ex-search practitioners, and they all have #2 guys helping them too.

The ascendancy of management is about taking an office manager and business developer and they become the head of North America. They are either blocked or they go elsewhere.

Yes. But current leaders won't get MBAs.

Client-Facing Future Leaders

3b. Would this increase your likelihood of seeking an additional credential?

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

Cross-Sector Institute Discussion

The creation of a cross-sector Center, Institute, executive education course, certification and/or graduate degree program on professional services leadership (i.e., competencies to more effectively direct, steer, manage and/or grow a professional or business service firm, including marketing and selling). This type of Center would be aimed at anyone who has or desires to gain decision-making responsibilities for the firm's growth, competition and survival.

A Center like this could:

- **...offer an array of choices for growing one's skills: short customized executive education sessions; formal certification credentials; and/or an executive master's degree.**
- **...conduct and/or support cross-sector research, conferences, case studies (and other data) on the emerging and best practices of firm growth, management or leadership.**
- **...be housed at a University, but it might also be free-standing.**
- **...support and/or extend an Association's credentialing and/or research agenda.**

Initial Reaction

Non Client-Facing Current Leaders

R27 I think it's a terrific idea because it's my experience that most PSFs are not well managed. I say that because I've seen the PSFs are all partnerships of some nature. What happens they take a functioning revenue-generating partner and put them into a leadership role. Most are extremely qualified to do their consulting role. They have tremendous skill set with clients, or problem solving and strategy. But in terms of managing people and the skill sets that are required to effect change or understand where the market is going, they are not trained on this. They are artificially put into their role, and many fail. Not for lack of **trying**. **It's** not in their DNA.

Any kind of educational setting that recognizes where these people are in their career continuum and understand that you are plucked out of your normal setting and now tasked to do something else. People would welcome the opportunity to do this better. Or organizations **would say many we've had 3 -4 MPs** and they have been a bummer. Maybe we should think about ramping these people up ahead of time.

Not too many firms think about succession planning, It's a popularity contest. But very few of those people have been trained.

Client-Facing Current Leaders

R28 I would be interested 15-20 years ago. Now I would want to send someone younger in my shop to do a thing like this. My concern is not (in their ability to run) the firm; it's about competing against the big boys. I can't learn that at a distance-learning course.

But if I wanted to sell equity to someone while I'm in Florida, I'd like to ensure that I sell the firm to a guy who has been trained. I don't care about certification. It's like an award. But in running a professional service firm, you would need a legitimate and regulated (degree).

The AESC was talking about certification. It's less about certification than it is about education and knowledge. The alphabet soup would come from a bona fide with a real degree.

If it's a legitimate educational experience that would be something I would look at. It may not be the only thing. It would be nice to have.

It would have to be a post-baccalaureate degree. That would be cool. I would like that.

Client-Facing Future Leaders

4a. What elements are most important or attractive?

Non Client-Facing Current Leaders

R27 The personal growth opportunity. While I think that research is interesting it won't help me.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

4b. What elements are least important or attractive?

Non Client-Facing Current Leaders

R27 Professional credential – not an appeal. I already have an MBA. A master's degree is already recognized and accepted. When I see finance guys or real estate people now have weird certifications, I pooh-pooh these. Certificates don't hold a lot of water. This doesn't mean they are really smarter. If it were a master's degree, that is better.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

4c. What else would you like to see included?

Non Client-Facing Current Leaders

R27 There should be more emphasis on personal growth. If there were actual one-on-one open coaching, (I would like that).

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

4d. What would be a key differentiator that might result in you considering participating in one or many of the services offered?

Non Client-Facing Current Leaders

R27

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

4e. What content areas or topics do you see as being most critical for your professional development?

Non Client-Facing Current Leaders

R27 Digital marketing. I don't get this. Also data mining to understand buying behaviors.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

4f. What delivery formats would you most prefer?

All face-to-face workshops/courses at the employer site.

All face-to-face workshops/courses in a university.

All online.

Hybrid with face-to-face workshops and follow-up online content.

Non Client-Facing Current Leaders

R27 All face-to-face.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

4g. What credentialing, if any, would you consider?

Master's degree

Certificate – what kind?

Other credentials

Non Client-Facing Current Leaders

R27 Master's.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

4h. What time commitment would be most appropriate and feasible?

Frequency of courses/workshops

Length of time for credential (if applicable)

Non Client-Facing Current Leaders

R27 Frequency.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

5. What would be the pros and cons of such a Center (program, certification, etc.) being housed at a university?

Non Client-Facing Current Leaders

R27 Pro:

- The university is more energizing. I am invigorated by a campus. Goose bumps.

Con:

- Not in a classroom with a bunch of non-peers. I don't want to be in a class with an 18-year old who doesn't care. I want to be with motivated people.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

6. What kind of university would be attractive to you?

Brand name schools versus lesser-known names

Big versus small

State university versus private

Already-demonstrated services-focus versus not

B-schools versus college of professional studies

Non Client-Facing Current Leaders

R27

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

7. What would be the pros and cons of such a Center (program, certification, etc.) being located in a big city (probe for Boston, Chicago, DC or NYC?)

Non Client-Facing Current Leaders

R27 Big city. I want it easily accessible by planes and lot of hotels available. Not Des Moines.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

8. Do you have any final thoughts?

Non Client-Facing Current Leaders

R27 I would be keenly interested if it were very tactically oriented toward my personal development. I don't want to go back to school for theory anymore. I want to be a better leader, listener, analyst. **It's not about the basics.** I now need to have a Center take my feedback and help me move from where I am TODAY. Assess people, effect change, negotiate better. Understand how the business relates to what I am doing, how to measure it.

I want practical help in developing those skill sets.

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders

9. Do you have any questions for me?

Non Client-Facing Current Leaders

R27

Non Client-Facing Future Leaders

Client-Facing Current Leaders

R28

Client-Facing Future Leaders



Research on Professional Development in U.S.-based Professional Service Firms

Law Sector



ExpertiseMarketingSM

**Suzanne Lowe, President
Expertise Marketing LLC
March 2011**

Respondent Number	Interviewee	Date of Interview	Profession	Firm Size	<i>Non Client-Facing (Marketing, Human Resources, Finance, etc.)</i>	
					Current Leader	Future Leader
R14	Pierce Atwood One Monument Square 7th Floor Portland, ME 04101 207.791.1100	8/30/2010	Law	Small Firm	X	
R15	Terri Mottershead Principal Mottershead Consulting Mottershead International Pty Ltd ABN 97 148 063 389 Phone USA: + 1 (415) 8121815 Phone Australia (International): + 61 448 220 190 Local Phone Australia: 0448 220 190 tm@mottersheadconsulting.com www.mottersheadconsulting.com	11/11/2010	Law	Large Firm	X	
R16	Skadden, Arps, Slate, Meagher & Flom LLP	9/9/2010	Law	Large Firm		X
R17	McGuire Woods	11/10/2010	Law	Large Firm		X
R18	Skadden, Arps, Slate, Meagher & Flom LLP	9/14/2010	Law	Large Firm		X
					<i>Client-Facing (central to the product/service firm offers)</i>	
					Current Leaders	Future Leaders
R19	Attorney Burns & Farrey	12/2/2010	Law	Small Firm		X

Professional Development Environment

1. Does your firm make available to you any kind of formal program so that you can grow your skills in marketing, business development or leadership?

Non Client-Facing Current Leaders

R14 They pay for me to attend anything I find of interest.

R15

Non Client-Facing Future Leaders

R16

R17

R18 Seven years in the field.
Not so much in marketing, but in management capabilities.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19

1a. What types of professional development is made available to you?

Non Client-Facing Current Leaders

R14 I choose conferences to attend. Beyond that, say a certification, they would pay that. I have an MBA.

R15

Non Client-Facing Future Leaders

R16 Wide variety. Not all of which I've needed. From basic PowerPoint classes to discussions about diversity in the workplace among management staff. Leadership seminars. A lot is done internally. I have taken classes externally too. For example, design classes when I was senior editor. I have also participated in BD webinars.

If I go to my supervisor with "I think this is interesting, will the firm pay?" The answers will be yes. Many opportunities are handed to me, and I am encouraged to seek opportunities as well.

R17 We have firm-wide training opportunities that are targeted in areas in which we work, but no formalized training programs for the marketing department. **But there are opportunities available. (If I asked) they'd accommodate.**

R18 Monthly classes on different relationships with employees, management techniques, leadership development. I took a class two years ago. It was six separate days on managing people and learning how to manage. This occurred at our firm, but it was with an external consultant. The 20 people who participated were nominated by marketing colleagues.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 No. Unless our meetings internationally could count, but those address issues (Not marketing, Business Development or leadership).

1b. Is everyone at your firm given the opportunity to take advantage of the professional development and training offerings?

Non Client-Facing Current Leaders

R14 Yes.

R15 It depends on the law firm about how this is structured. It is not a question of revenue-generating people vs. nonrevenue-generating people. **This is too divisive. I have to say you can't generate revenue in the absence of the rest of team.**

But that philosophy is different in different law firms, and it plays out differently. In some firms where they have a professional development director, you will find that person responsible for ALL Professional Development. It doesn't matter who's being developed or for what: 1) technical training 2) use of or know-how for anything that is internet or web based, computer, phone, IT, tools of the trade or for your job function and 3) management (people, sales, client relationship).

Other firms more typically only do attorney development, and the HR function does professional staff development. This leads to wasted resources and inequality of training for attorneys rather than staff.

For attorneys it used to be standard law training (client interviewing skills, how to take a deposition, how to draft a contract, etc.), in addition to keeping up with the law. Now that's expanded into the management of topics. With a focus on marketing and sales training, project management training and people management training too. More junior attorneys spend some time in the "business of law" topics. Then at around year 4-5, it starts to invert past the technical toward the business of law. The above is most "AmLaw 200" firms. But it depends on whether they have a dedicated professional development specialist, and not just an HR department.

Non Client-Facing Future Leaders

R16

R17 There are certainly opportunities for attorneys; there are a number of training programs offered by the firm, but I am not aware of them in depth. I've been at this firm around one year.

R18 Yes, on the staff side. Yes, everyone.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 Our professional development & training relate to law, not marketing.

1c. If your firm conducts its own professional development or training, why might you seek or request an outside provider like an industry organization, university, etc.?

Non Client-Facing Current Leaders

R14 Yes it does conduct its own professional development and training. Fledging, but I have been working with our HR to do this. Paralegals too. The firm also probably has outside professional development and training sources, **but I haven't engaged this myself.**

R15 It depends which group you are _____. There will be a big focus on in-house right up to the point at which a person becomes a partner. THEN you have a difference in who handles professional development. Law firms are grappling with this now. Associate competency models are being adopted now; this focuses on the associate. They are offering much better development platform for associates. But this not the case for partners. The new partners do have low-level orientations and it is done in-house. But once you get to more sophisticated heavy-hitting management training, then you find the partners take that on as their own. Particularly the Managing Partner feels this is his bailiwick. It can almost become a club. Depending on the dollars, you get Harvard and Wharton; they are unbelievably useless, and normally ____ like an executive MBA level).

These programs do help educate in jargon and common business practices, but no one really understands why they are selected. **There is no explanation; it's like a prize. Ends up being a negative. Our emerging leaders find out their eyes are opened to the things that are broken, and there's no way to fix them! It's training for the sake of training. It's not for a strategic reason. It raises the bar in the direction of the firm's performance goals.**

One of the big things is the issue around reputation, ego and credibility. I know that for the hook ups with named B schools, **everyone wants to go there because it's a badge of honor. It is all about the name brand. They didn't learn much! They are** looking at HBS case studies that these schools teach to MBA students. The HBS guys are fabulous instructors, and they have great answers, but what the attorneys tend to forget is the biggest learning experience is from each other!

Non Client-Facing Future Leaders

R16 If the topic of interest to me **wasn't offered internally.**

R17 They do (conduct their own professional development or training) for attorneys. They attend seminars, or go to organizations that promote professional development or have a professional development component like the Legal Marketing Association. I have not yet gone outside for training.

R18 I have gone outside for training but not at Skadden. I have taken a leadership development seminar, but not from the marketing side. Today I might go outside because I don't only want to know how Skadden does things. I would do this for career development, to apply to a future job.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19

- 1d. If your firm uses an outside provider like a university, why did your firm choose this particular type (of university)? What factors are important?**

Non Client-Facing Current Leaders

R14 For expertise we don't have internally.

R15

Non Client-Facing Future Leaders

R16

R17

R18 Don't do this.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19

1e. Have you pursued your own pathway to grow your skills in marketing, business development or leadership?

Non Client-Facing Current Leaders

R14 Got my MBA when I was working at a firm where I had been doing many roles. I had lived in New Zealand and returned to the States. I wanted a well-known program. I found the Pepperdine program.

R15

Non Client-Facing Future Leaders

R16

R17 I pursued marketing-related internships while at my undergraduate college. After college, I went into a different industry then decided to return to marketing. I was a communications and economics undergrad.

R18 Leadership. I don't remember the name, and it was for networking purposes. I actually helped intern at this leadership development seminar, and I ended up participating. It was more about dealing with goals and what you wanted out of your career.

I did speak to a career development person. This was to help me decide what I wanted.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 No.

1f. What has driven you to pursue your own pathway? What do you hope you can gain from pursuing your own skills growth avenues?

Non Client-Facing Current Leaders

R14 I had always wanted an MBA. Learning was and always is important to me. I enjoy learning. I thought it could benefit me in my career. I was a COO, but not by title. I was a national practice manager for a large New Zealand law firm (250 lawyers).

R15

Non Client-Facing Future Leaders

R16

R17 At the moment I am in the process of getting my MBA. 1) I felt like I need core business courses 2) I just felt that having an MBA and being able to expose myself to additional marketing courses (about globalization, and about consumer behavior) would help me better understand marketing and legal marketing.

R18 Networking. But also in my career, I feel I have great skills for being at this great firm. But these direct things aren't enough. I need to understand the entire professional services realm, and be able to make myself more marketable. Not to leave but to bring in new ideas.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19

1g. What avenues are you pursuing / did you pursue? Who provided this training?

Non Client-Facing Current Leaders

R14 Pepperdine MBA program.

R15

Non Client-Facing Future Leaders

R16

R17 University of Richmond.

R18

Client-Facing Current Leaders

Client-Facing Future Leaders

R19

1h. How important to you is a formal degree or certificate? Why? What do you hope will happen once you have your degree or certificate?

Non Client-Facing Current Leaders

R14 I got an advanced degree because it's more in-depth study. Represents more depth and quality. More value. Certificates are more focused on a couple of subject matters. The overall experience was educational, as was learning from the fellow students. I worked while I did this program. It was 22 months. Evening and weekends.

R15

Non Client-Facing Future Leaders

R16

R17 An MBA was important because it is more fully immersed in the educational environment. Certificates are good but I wanted a more in-depth and comprehensive education.
I would love to take on new responsibilities in my current job and try other aspects of legal marketing. Perhaps I might go into consulting long term.

R18 Important. Pretty important. Interesting that there isn't anything tailored to what we all do here. Definitely interested. Any certification you can get helps no matter what you're doing.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19

1i. Did your firm pay or would they pay for or reimburse you for pursuing your own pathway to grow your skills?

Non Client-Facing Current Leaders

R14 I paid out of pocket.

R15

Non Client-Facing Future Leaders

R16

R17 The firm reimburses a part: ¼ - 1/3. There are criteria, based on grades (an A or B, with confirmation).

R18 Partially. I think. They do partially reimburse for certain education avenues. At least they used to.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 It is a possibility, but not sure I'd be the one our managing partner would send. (He'd send our "marketing" lawyer.)

1j. What outcomes do you believe are prioritized for professional development by the firm? What do you think the firm is hoping that employees get out of the professional development and training opportunities?

Non Client-Facing Current Leaders

R14 Pierce Atwood wants them to have more experience and knowledge to do their own jobs. More quality job satisfaction, engagement. It's motivational to support employees. There are a lot of things that go towards rewards for employees. I'm not sure it's all about employee retention.

R15

Non Client-Facing Future Leaders

R16 They want to improve the skills of each individual. How can we get smarter, how can we make the end product more attractive.

R17 It benefits the firm if its employees are engaged in their own education and learning about their field. It will help employees better serve the firm. They want us to learn more.

R18 I've noticed when dealing with attorneys, they say "you're the marketing professional, you know best." I feel like I really don't know. I could almost come from a better place when giving direction. They would think of me as a more reliable source. The impression would be reliable within marketing too.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19

Professional Development - Opinions

[NON CLIENT-FACING: Some professional and business service leaders have told us that firms will increasingly seek some kind of recognized credentials from their non revenue-generating leaders in marketing, business development, operations, finance, HR or IT.]

2a. What is your opinion of this statement?

Non Client-Facing Current Leaders

R14 I agree. They already have.

R15

Non Client-Facing Future Leaders

R16 When we hire people it's a bonus if they have professional services experience or an undergraduate or master's degree with a focus on marketing or some other relevant field. It could only be an asset on someone's resume.

I think it would be helpful to get you in the door. But at the end of the day the leader will choose the best person, not just "credentials."

R17 **I don't know** – I am not in a position to hire or interview people. But I do see people coming in more with advanced degrees. **I don't know (advanced degrees) to be a requirement. There are more of the advanced degrees out there, but I'm not sure the firms are looking for it.** But I think more and more people have it (so firms are beginning to want it).

R18 I have already noticed this. There are a lot of places who want lawyers to lead marketing. It kind of puts me at a disadvantage that I don't have any graduate education. I only have my undergraduate degree. Having an extra certification would help all professional service organizations.

2b. Would this increase your likelihood of seeking an additional credential?

Non Client-Facing Current Leaders

R14 I think firms have always found value in additional credentials. There are many who got CLM credentials. Some might want a CPA. Degrees in finance, HR, etc. are readily understood. If firms are going to value what you are outlining, they will first have to understand it.

R15

Non Client-Facing Future Leaders

R16 I would pursue this if I saw anecdotal evidence that credentials are increasingly desired.

R17 Yes for me it was a factor. I wanted to differentiate myself against others.

R18 Yes.

[CLIENT-FACING: Some professional and business service leaders have told us that their firms will increasingly seek practitioner-managers whose credentials set them apart from “home-grown” leaders.]

3a. What is your opinion of this statement?

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 It is not going to affect a firm of our size, with our limited target market, and niche (insurance defense). It is probably true of other service industries, probably more so. It's probably very true for firms that are broad based, not small-niche like ours.

3b. Would this increase your likelihood of seeking an additional credential?

Client-Facing Current Leaders

Client-Facing Future Leaders

R19

Cross-Sector Institute Discussion

The creation of a cross-sector Center, Institute, executive education course, certification and/or graduate degree program on professional services leadership (i.e., competencies to more effectively direct, steer, manage and/or grow a professional or business service firm, including marketing and selling). This type of Center would be aimed at anyone who has or desires to gain decision-making responsibilities for the firm's growth, competition and survival.

A Center like this could:

- **...offer an array of choices for growing one's skills: short customized executive education sessions; formal certification credentials; and/or an executive master's degree.**
- **...conduct and/or support cross-sector research, conferences, case studies (and other data) on the emerging and best practices of firm growth, management or leadership.**
- **...be housed at a University, but it might also be free-standing.**
- **...support and/or extend an Association's credentialing and/or research agenda.**

Initial Reaction

Non Client-Facing Current Leaders

R14 I want to say that sounds fantastic. I do value learning. I like the idea of cross-training. It sounds good. But I think lawyers would be skeptical as to the value of this. I wouldn't have gone for this myself. The more traditional approach would be more favored. It plays to my strengths to stay in legal (and so she decided to go "traditional").

R15 Not heard of it in U.S.

University of Nottingham has had a dedicated law firm MBA for many years. That's the only one I know of. They are probably one of the first.

- 1) How is this idea different from the certification of those bodies that already have them or are already doing them? Change management, etc. Why would one go here instead of a professional body already offering certification? Professional development is one if the few professional bodies and professions that does not have certifications. But the Association of Legal Administrators has certifications. The HR folks have loads of them through the Society of Human Resource Management. Why go to the one you've described in this research?

- 2) In terms of broader professional service management training, you must look at that and unseat the Harvard position. If **you did something for half the price, and brought in the other professors you'd always be known as the easier choice than Harvard. Harvard has already got the cash cow here. Your center would be known as "not HBS." "You couldn't get in to HBS." Harvard has the name and reputation. Your differentiation is going to be more in the area of dedicated programming.** It is like a law firm one-week program. No one else is doing this. We might have folks doing MBAs, but they will **want to go to HBS. You'll have to answer the question, "why would I go to you instead of Harvard?"**

Harvard is not looking at the younger markets now. They only want the managing partners. The faculty only want the consulting projects. You should build a reputation for senior associates and grow with them. Then when you offer a Harvard-type program **you have an "alumni."**

Programs for mid-level associates have died off with the economy. There is not much for new partners (something that's beyond "orientation").

Hastings runs a woman-in-law program. It costs \$6,000 – 7,000.

Australia Management school by Matt Eliza for a long time. Neil Oakes. They have operated for 20-25 years. Completely focused on associate partners. It was expected that we would learn to manage our practices. Terri did her MBA at the Cardiff Business school. When she went there, the Oxford MBA was just starting. That was 12-13 years ago. The Australian model will probably come close.

Non Client-Facing Future Leaders

- R16 Interesting. Lots of ways to think about this. Personally, not having a credential has not hindered me yet. In addition to legal journalism as a background, I founded a company before joining a law firm. If I felt my career was hindered by a lack of a credential, I would want to do what was necessary to get that credential.
- R17 I think it would be useful tool for people who are trying to advance their professional careers, and for those looking for learning opportunities in their field of expertise. Positive reaction.
- R18 Positive. I think if it was part of a university, from a marketing perspective, it would be more marketable. But all professional service industries and compass under this idea are all moving in the same direction. A lot of professionals are looking for something. Schooling feels like it would take a lot of time, but it doesn't have to be just an exam.
- A short program or a long program would generate interest. It is needed in this field. When I first started it was a different beast than its become. It can only help all the sectors, if there are professionals who are able to work with those in other sectors. I would get exposed to those other professionals. This can only help my company. I think other sectors our way ahead of law firms in marketing.
- If these other professionals were in my class, it can only benefit others.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 It's intriguing. Whether it would fit a firm our size and client base, I don't know. Whether we have the people to divert someone's attention away from practicing law. If we needed to hire someone from the outside to assist with this, though, it would be good to have this Center.

I have a positive feeling to what you described. I am not sure I would see myself doing it. My guess is that it would be better used by someone on a part-time supplement to what they are already doing.

4a. What elements are most important or attractive?

Non Client-Facing Current Leaders

R14 I have worked with people in KPMG and EY; they have strong [professional development]. They are way ahead of the legal industry. From diversity initiatives to improving their services. The legal sector only moves when clients move. I like it from that perspective.

R15

Non Client-Facing Future Leaders

R16 Any type of seminar or course or well-written research paper that is well done. Easily accessible well-done content such as webinars would be attractive.

R17 Overall the different types of programs offered are good. Not everyone would sign up for a full-time MBA, but they might want an opportunity to take an executive MBA or have an option to do specific programs that don't require as much time.

R18 Having options to choose from short / long.
It's diversity. I like that one could take classes or whatever.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 The most direct element, which is developing the skills, through actual teaching.

4b. What elements are least important or attractive?

Non Client-Facing Current Leaders

R14 People will be skeptical about whether it will be applicable to law firms. Lawyers won't turn control over to administrators.

R15

Non Client-Facing Future Leaders

R16 Formal education program, like going back to grad school.

R17 The aspect of it not being associated with a university. It should be an accredited program. If it's not, that would be less attractive. Then it would have to have a strong reputation and credentials to attract people.

R18 I don't have any. Sounds great.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 The research or aligning it with an association. It makes sense to give it more credibility but it's not an appealing selling point for me.

4c. What else would you like to see included?

Non Client-Facing Current Leaders

R14

R15

Non Client-Facing Future Leaders

- R16 Webinars.
Articles available through the center and the Legal Marketing Association.
- R17 Continuing education courses that are just open-ended, not degree oriented.
- R18 Core competencies are important.
It would be important to have an admissions process. I wouldn't want just anyone to take it. There are professionals in the industry who should be steered more toward advanced certificates or education. The others should be weeded out. I would want to be with peers.

Client-Facing Current Leaders

Client-Facing Future Leaders

- R19 Can't think of anything.

4d. What would be a key differentiator that might result in you considering participating in one or many of the services offered?

Non Client-Facing Current Leaders

R14

R15

Non Client-Facing Future Leaders

- R16 Feedback from others, those whose opinions I trust. Ideally it would be a personal reference. For example, a class that someone else has taken and found to be high quality.
- R17 Reputation.
The quality of the teachers and lecturers.
Statistics on what happens afterward (like people who go on to get better paying jobs or promotions, etc).

R18 I can't imagine not considering it.
An admissions process.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 Not necessarily giving me more success (we don't offer incentives for bringing in business) but because it gives me job security in terms of growing the firm. If I could emulate something we haven't thought about, or to hear about something we could do to be better (that would make me consider it).

4e. What content areas or topics do you see as being most critical for your professional development?

Non Client-Facing Current Leaders

R14

R15

Non Client-Facing Future Leaders

R16 The business development aspects. Remembering the client in your pitch materials. How to frame content, how does this opportunity tie to cross-selling?

R17 **In my role, it's consumer behavior** -- understanding clients internally and externally. And the shifting business environment to one that is becoming more global.

R18 Core competencies. I think all professional services have certain core competencies. Like business development. All are client- and service-targeted. Defining them is important, across industries. Customer service, for example. Learning how to market the professional services environment, and what it takes to manage in this sector.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19

4f. What delivery formats would you most prefer?

All face-to-face workshops/courses at the employer site.

All face-to-face workshops/courses in a university.

All online.

Hybrid with face-to-face workshops and follow-up online content.

Non Client-Facing Current Leaders

R14 A university based program would be valuable. At least some element of face-to-face, mixed with online.

R15 It depends on what level we are appealing to. It has to be hybrid. One of the most valuable things is the network they build. Face-to-face is key to networking. After the program is DONE, the touch points can be virtual.
A short face-to-face program would be cheaper. It's generational. They will not have the money.

Non Client-Facing Future Leaders

R16 Hybrid. Online is easiest but face-to-face is more impactful.

R17 Hybrid. Currently I meet face-to-face for my MBA at the University of Richmond.

R18 Rather go to a university. Not firm-centric. A neutral site is best.
Hybrid.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 All face-to-face at a university
Hybrid as second choice.

4g. What credentialing, if any, would you consider?

Master's degree

Certificate – what kind?

Other credentials

Non Client-Facing Current Leaders

R14

R15

Non Client-Facing Future Leaders

R16 If the market demands it, the master's degree, but I would have to be convinced that it's necessary.

R17 Master's degree, but also would consider a certificate (in professional service management).

R18 Master's degree but option for a certificate is attractive.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 A degree. And a certificate. Depends on time and effort required.

4h. What time commitment would be most appropriate and feasible?

Frequency of courses/workshops

Length of time for credential (if applicable)

Non Client-Facing Current Leaders

R14

R15

Non Client-Facing Future Leaders

R16 Frequency is a challenge. It's easy to do anything once even if it is two -- three days, than over a period of time.

R17 Frequency --It depends on degree. An MBA is more involved. I am meeting two times a week (evening) for class, all year.
Length of time: three years.

R18 I'd rather it be more frequent and take less time. It helps keep things in my head.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 Frequency: (the learning would) stick more if it were once a week. Could be two-three days at a time.
A degree = one or two years.
Certificate is less time.

5. What would be the pros and cons of such a Center (program, certification, etc.) being housed at a university?

Non Client-Facing Current Leaders

R14

R15

Non Client-Facing Future Leaders

R16 More credibility as a new market entrant.

R17 A university is attractive because it goes back to having pertinence. And knowing that the professors and the environment are focused and they have experience in the courses you're trying to tackle. Universities feel more serious.

R18

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 Lends credibility to the whole thing. Depending on the university.

6. What kind of university would be attractive to you?

Brand name schools versus lesser-known names

Big versus small

State university versus private

Already-demonstrated services-focus versus not

B-schools versus college of professional studies

Non Client-Facing Current Leaders

R14

R15

Non Client-Facing Future Leaders

R16 The more prestigious the organization, the better. To the extent that it becomes a master's program, association with a B- school would be most useful.

Lot of B schools have made curriculum changes to include leadership, ethics and other less traditional focuses.
Having a services focus is less important than a broader business program.

R17

R18 B school with a more brand-name place. Those things would matter less over time if the program is respected.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 Brand name, no matter about the size, state versus private is not a factor even though I myself only went to private universities, services focus doesn't matter, B school might look better.

(Also the kind of university) depends on whether I'd be interested in shopping myself to clients, and/or to other (firms), which I'm not.

7. What would be the pros and cons of such a Center (program, certification, etc.) being located in a big city (probe for Boston, Chicago, DC or NYC?)

Non Client-Facing Current Leaders

R14 In a big city you have a more ready audience. If you are trying to appeal to people from far afield regions, it would depend on the length of the course work. If I participated in the program, I would need a reason to be in these locations to advance my learning. If EY hosted a half-day program, for example, that makes it worth my while to have it be in a big city.

R15

Non Client-Facing Future Leaders

R16 Big cities are beneficial. Access to industry that's there. Access to internships.

R17 The types of people that are teaching in a big city would be from well-known corporations. Better networking opportunities. Exposure to students who are like-minded, and who are also working for leading corporations.

The "pro" of a smaller town is if you're looking to stay in that geographic market. But the "con" is that if you're looking to get a job elsewhere, you limit your circle.

R18 Pros – easily accessible. Since those cities have hubs where their firms are based. It may make ... experienced.

Client-Facing Current Leaders

Client-Facing Future Leaders

R19 If you target students who are already professionals, more of them are in big cities or have access to big cities. It's an easier target audience.

8. Do you have any final thoughts?

Non Client-Facing Current Leaders

R14

R15 In almost every of these cases, they have grown up through a University. Georgetown has an institute of professional studies. That's an example. There are also places on west coast.

Great concept. There is market for it. Decide what are the best associations with which to partner.

Non Client-Facing Future Leaders

R16

R17 Even in the courses I'm taking now it's a struggle to take the information we are learning and apply it to a professional services company. There is a need to have more focused learning on professional services.

R18 I think it's a great thing. I want to be with people who really want this and are qualified to do this. Admissions process!

Client-Facing Current Leaders

Client-Facing Future Leaders

R19

9. Do you have any questions for me?

Non Client-Facing Current Leaders

R14

R15

Non Client-Facing Future Leaders

R16

R17

R18

Client-Facing Current Leaders

Client-Facing Future Leaders

R19



Research on Professional Development in U.S.-based Professional Service Firms

Management Consulting Sector



ExpertiseMarketingSM

**Suzanne Lowe, President
Expertise Marketing LLC
March 2011**

Respondent Number	Interviewee	Date of Interview	Profession	Firm Size	<i>Non Client-Facing (Marketing, Human Resources, Finance, etc.)</i>	
					Current Leader	Future Leader
R20	Small Management Consulting Company	8/19/2010	Management Consulting	Small Boutique	X	
R21	Sarah Kulka Director of Marketing L.E.K. Consulting s.kulka@lek.com	8/27/2010	Management Consulting	Mid-size Global Firm	X	
R22	Boston Consulting Group Manager – Marketing, The Americas	9/7/2010	Management Consulting	Large Global Firm		X
R23	The Hay Group Marketing Associate	9/22/2010	Management Consulting	Large Global Firm		X

					<i>Client-Facing (central to the product/service firm offers)</i>	
					Current Leaders	Future Leaders
R24	Sallie Sherman President and CEO S4 Consulting 580 North Fourth Street Suite 600 Columbus OH 43215 614.220.5700 ssherman@s4consulting.com www.s4consulting.com	8/20/2010	Management Consulting	Small Boutique	X	
R25	Partner McKinsey & Company	11/29/2010	Management Consulting	Large Global Firm	X	
R26	Large Management Consulting Company	8/17/2010	Management Consulting	Large Global Firm		X

Professional Development Environment

1. Does your firm make available to you any kind of formal program so that you can grow your skills in marketing, business development or leadership?

Non Client-Facing Current Leaders

R20 Yes – Leadership Development Program.

R21 Yes.

Non Client-Facing Future Leaders

R22 No. Professional development for support functions is centered around communications skills, feedback and necessary technical skills (like MS Office, etc.). All PD efforts are focused on the revenue generating side of the business.
All PD on the nonrevenue-generating side is self motivated – this is the culture of the firm. **The don't offer any programs formally** but encourage and pay for support functions to get training on their own initiative as long as it relates directly to their job function. This includes seeking out MBAs, certificate programs, and mentors within the firm.

R23 No - they do very little with regard to PD. They will pay for programs or courses if approved on a departmental basis and if related to the job but it's more the exception than the norm.

Client-Facing Current Leaders

R24 No, not internally – send people to outside courses as necessary.

R25

Client-Facing Future Leaders

R26 Yes.

1a. What types of professional development is made available to you?

Non Client-Facing Current Leaders

R20 None are automatically made available.

R21 Firm-sponsored PD or training curriculum –

- Professional Development program is primarily designed for consultants but is available to marketing staff.
- Sales Training Program for new partners - run by the VP of Sales using outside support materials.

Firm-sponsored Mentoring Program –

- Yes, for consultants. None available for marketing staff.

Executive Coaching –

- Not for marketing staff.

MBA and other **Master's** degrees –

- Not sure - **have partial reimbursement but it's not a formal program for the marketing side.** Consultants sponsor select people for business school.

Executive education –

- Not for marketing staff.

Certificate or Certification Program -

- Nothing formal but she has a budget for various professional development programs. May or may not result in certifications. Recently sent individuals to a one-day social media seminar.

Non Client-Facing Future Leaders

R22 Firm-sponsored PD or training curriculum – See above.

Firm-sponsored Mentoring Program – See above.

Executive Coaching – See above.

MBA and other **Master's** degrees – See above.

Executive education – See above.

Certificate or Certification Program - See above.

R23 Firm-sponsored PD or training curriculum – None.
Firm-sponsored Mentoring Program – None.
Executive Coaching – Not sure.
MBA and other **Master's** degrees – Yes, have funded some in the past.
Executive education – None.
Certificate or Certification Program – None.

Client-Facing Current Leaders

R20 Firm-sponsored PD or training curriculum –

- Firm sponsored Leadership Development Program - focused on all senior level staff. Program emphasizes leadership development versus marketing skills.
- Firm will also pay for outside programs she recommends - these programs mostly focus on business development and presentation skills.

Firm-sponsored Mentoring Program – In-house coaching / mentoring program applies to all staff including analysts who are more recent college graduates.
Executive Coaching – same as above.
MBA and other **Master's** degrees – No.
Executive education – No, but they are involved with teaching some of these programs at Wharton and Cornell. They also offer some of executive education programs for clients.
Certificate or Certification Program – No.

R24 Firm-sponsored PD or training curriculum – NA.
Firm-sponsored Mentoring Program – NA.
Executive Coaching – NA.
MBA and other **Master's** degrees – recently hired a consultant to work with social media, may send him for some additional education but probably not an MBA. Firm would pay regardless if they want to keep him.
Executive education / Certificate or Certification Program –

- **She goes to some executive sessions but doesn't find them valuable.**

R25 McKinsey offers a lot of programs related to direct activity of serving clients. There are things on negotiations, how to think about CEO-level agendas. The language of selling is taken out of the equation. There are formal training programs on how to be a senior professional at the firm. But in terms of actual programs on managing areas of the firm as an organization, I haven't seen it.

Client-Facing Future Leaders

- R26 Firm-sponsored PD or training curriculum – Yes, same as some other companies - **it's a very robust Professional Development** program. This was a key differentiator in interviewee choosing this large management consulting company - his previous experience was with a smaller consulting firm - their PD program is much less structured and would have required going outside the firm for a similar level of PD.
- At the introductory level for the first 2.5 - 3 years, the PD program is largely focused on more technical skills and thought leadership.
 - Next level is for Junior Managers and focuses more on client management.
 - After roughly five years from the time of entering the firm - at the Manager / Senior Manager level - the focus shifts more toward relationship management, business development, leadership, etc.
- Firm-sponsored Mentoring Program – all types of formal and informal mentoring and coaching programs are included within the PD program - they get feedback from all directions.
- Executive Coaching – see above.
- MBA and other **Master's** degrees – pre MBA students are hired as Associate Consultants and go through a 2 - 3 year program. Strong performers are sometimes sponsored for MBA programs. They usually go to Wharton, Stanford and Harvard. Does not know the details but there is some form of tuition reimbursement and promissory note involved.
- Executive education – Not aware of any, the PD program is very structured at all levels and represents a huge cost center to the firm.
- Certificate or Certification Program - see above.

1b. Is everyone at your firm given the opportunity to take advantage of the professional development and training offerings?

Non Client-Facing Current Leaders

- R20 See above.
- R21 See above - most formal programs are designed for consultants.

Non Client-Facing Future Leaders

- R22 Yes, but everyone needs to build a strong business case for the necessity of such training.
- R23 Yes.

Client-Facing Current Leaders

R24 Yes, as needed.

R25 On different things, yes. There are training programs for everyone. But the other things (above) they are aimed at partners, primarily and those in the run-up to becoming a partner.

Client-Facing Future Leaders

R26 Mandatory for all revenue generators, not for administrative staff - unsure of requirements related to PR, HR, and Marketing professionals.

1c. If your firm conducts its own professional development or training, why might you seek or request an outside provider like an industry organization, university, etc.?

Non Client-Facing Current Leaders

R20 Availability – internal programs do not focus on support staff or non-consulting roles.

R21 Availability - internal programs do not focus on support staff or non-consulting roles.

Non Client-Facing Future Leaders

R22 N/A

R23 The firm would seek outside help to get access to best practices or learn about industry trends.

Client-Facing Current Leaders

R24 N/A

R25 Both. Primarily McKinsey-designed and led. But there are outside faculty who are brought in (Korn/Ferry for example) on some of the programs. Or a retired McKinsey partner as the lead person.

I teach some of these programs. Outsiders are very good facilitators, generally better than an average McKinsey partner trying to be an educational facilitator. They (Korn/Ferry outside faculty) also have access to the state of the art external information on leadership development.

Client-Facing Future Leaders

R26 No reason to seek outside training given depth of his company's program. At a smaller firm, he would need to seek outside training but doubts he would have had the time.

1d. If your firm uses an outside provider like a university, why did your firm choose this particular type (of university)? What factors are important?

Non Client-Facing Current Leaders

R20

R21

Non Client-Facing Future Leaders

R22 Brand recognition.
Executive education directly connected to marketing.
Well-regarded professors.

R23

Client-Facing Current Leaders

R20 Outside providers include

- Training Resource Group (TRG) - out of Philadelphia - focus on sales training. www.trainingresourcegroup.com.

These firms are chosen because:

- To supplement the leadership development program.

R24 They seek outside training firms that mesh with the values of the firm. It must be practical and research based, and must have a positive impact on the people they send.

Courses sought depend on what they need – never go to universities – only training companies that they think highly of.

Firms they have used:

- Landmark Training (www.landmarktraining.com) - individual and organizational effectiveness.
- Strategic Account Management Association (www.strategicaccounts.org) – customer / supplier collaboration - not helpful.
- Center for Creative Leadership (www.ccl.org) – leadership education and research.
- Toast Master's (www.toastMaster's.org) – public speaking group.

R25 Yes, but this is fairly restricted. The main programs are not done with a university. They are done to McKinsey's design.

Client-Facing Future Leaders

R26 N/A

1e. Have you pursued your own pathway to grow your skills in marketing, business development or leadership?

Non Client-Facing Current Leaders

R20 Not recently – she has 28 years of experience and pursued her own pathway earlier in her career.
One need she would consider pursuing now is social media – big need in the marketplace now for this.

R21 No - she has an MBA and a **Master's** in Communication.
She is still new to the firm and has a lot more internal learning to do - she is also new to professional services marketing. She is still understanding what she needs to do to be effective within this firm / industry sector. She will probably want to bolster her business development and sales skills at some point in the future.

Non Client-Facing Future Leaders

R22 Yes, she did this on her own.

R23 Not really.

Client-Facing Current Leaders

R24 Yes, in the past (she is 65 years old). Still attends lectures now and then.

R25 Yes. It was largely apprenticeship. I tagged along with those who knew how to do it, and you eventually pick things up. When you are in large stable client relationships, you pick things up. You are allowed to run things out.

I also read things like David Maister's books, and others. There are things to learn from external experts on selling marketing. But this is all my own initiative.

Client-Facing Future Leaders

R26 N/A

1f. What has driven you to pursue your own pathway? What do you hope you can gain from pursuing your own skills growth avenues?

Non Client-Facing Current Leaders

R20 N/A

R21 N/A

Non Client-Facing Future Leaders

R22 **Building a network of professionals so she can understand what is going on outside of BCG ("which tends to look inward a little too much").**

Interest in benchmarking herself compared to professionals at other organizations.

BCG does not appear to offer a great career path in marketing for future leaders. There are only six marketing professionals serving the domestic side of the business.

- Competition for Director-level positions in marketing is strong because the firm not only considers marketing staff for promotions but also moves ex-revenue generators from the consulting side over to support functions.

R23 Learning about new trends and topics of interest.

Client-Facing Current Leaders

R24

R25 When I was at my previous employer, I noticed that the people who had power and influence were those who were associated with significant client billings. You look to create opportunities for others. This is important. Everyone who has their eyes open recognizes they want to be good at those things. Apprenticeships only go so far. It becomes idiosyncratic for the person HOW they develop clients and maintain relationships. There is a limit to how much pure imitation you can do. Then you need something beyond that.

That is why I read those books.

Client-Facing Future Leaders

R26 N/A

1g. What avenues are you pursuing / did you pursue? Who provided this training?

Non Client-Facing Current Leaders

R20 N/A

R21 See 1e.

Non Client-Facing Future Leaders

R22 Center for Creative Leadership (www.ccl.org) – leadership development program. Great four-day program.
<http://www.ccl.org/leadership/programs/LDPOverview.aspx>

Northeastern University – two-day leadership development program.

Other one-off courses.

R23 He has attended some classes on social media where they talk about best practices, use case studies, and discuss successful strategies. This was organized by the Philadelphia Social Media Club which is an independent high technology group.

Client-Facing Current Leaders

R24

R25 I have a bachelor's degree and my MBA. I got my MBA from Harvard Business School after two years in business.

Client-Facing Future Leaders

R26 Got an MBA.

1h. How important to you is a formal degree or certificate? Why? What do you hope will happen once you have your degree or certificate?

Non Client-Facing Current Leaders

R20 The importance of a certificate is not immediately in marketing at least— on the job experience is more important. SMPS certification program did not add the value they were hoping for – too junior level (based on her experience between the years of 1998 – 2005). **An executive master's degree in professional services leadership** would be important, however.

R21 Not important in management consulting firms, especially if you have your MBA - most do.

Non Client-Facing Future Leaders

R22 In general:

- Ten years ago – very important.
- Now – important but not critical. Experience and knowledge are more important.

Personal – from her perspective in moving up the ladder at another firm at some point in the future – any additional qualification that you can add to your resume is important.

R23 A formal degree or certificate would add credibility to a course and show that it means something.

Client-Facing Current Leaders

R24 Certificates don't make sense for this type of consulting firm – "they are based on someone else's standards." There are no best practices in management consulting.

A "Management Consulting Certificate" would not be useful – consultants are getting these skills as part of MBA programs.

She started in consulting years before when consultants were PhDs or retired senior executives – then the IT industry changed this model with outsourced workforces and everyone started calling themselves consultants.

Certificates might make sense for more specialized "cookie cutter" firms that are doing specialized technical things.

R25 Getting an MBA wasn't really for the credential itself. It was more for actually picking up knowledge, and getting in the mix for access to career opportunities.

Client-Facing Future Leaders

R26 Not very important unless it is something significant like a CPA, Series 7 or CFA. He would be interested in the latter because, albeit largely irrelevant for his current position, it represents a challenge and is really worth something.

1i. Did your firm pay or would they pay for or reimburse you for pursuing your own pathway to grow your skills?

Non Client-Facing Current Leaders

R20 No – the firm occasionally pays for tuition reimbursement.

R21 Yes, partial tuition reimbursement.

Non Client-Facing Future Leaders

R22 Yes, if it is directly linked to your job.

R23 Yes.

Client-Facing Current Leaders

R24 Yes.

R25 I got help with the tuition as part of a signing bonus. The bonus was from my previous employer. I took out loans before that.

Client-Facing Future Leaders

R26 N/A

1j. What outcomes do you believe are prioritized for professional development by the firm? What do you think the firm is hoping that employees get out of the professional development and training opportunities?

Non Client-Facing Current Leaders

R20 Increased skills - a blend of analytics and social science but grounded in economics.

Their emphasis is on developing 1) consulting methodologies like client and relationship management and 2) leadership abilities like the ability to help grow the firm.

R21 Broader managerial skills - has 45 internal clients that need to be kept happy.

Internal education on how marketing professionals can help drive the business is valuable.

Marketing professionals are now viewed as being more closely tied to revenue generation in management consulting firms.

Non Client-Facing Future Leaders

R22

R23 The firm would hope for an expanded knowledge base and greater skills. This would create a continuous learning culture.

Client-Facing Current Leaders

R24 Hopes to gain from professional development.

- Self awareness, assertiveness – the ability for a consultant to be clear about what they are promising.
- Depends on the needs of the individual – great speakers are not necessarily good managers or business developers. Get training in areas of weakness.

R25 Now I am the teacher. You keep on going; I still need to learn. I progress on leadership and engaging in followership. These are important. I still take McKinsey courses, and still engage in apprenticeship. I learn from other McKinsey leaders. The books are less relevant now because they are so situation-specific. I see a McKinsey culture as so specific, it tilts. Exchanging knowledge makes sense too.

Client-Facing Future Leaders

- R26 They want people to be able to do the job - there is a defined skill set that requires mastery (Strategic Tool Kit = more technical and foundational skills).
- Bigger picture - **"this is an apprenticeship business where managers are a rare breed."** The firm needs good managers who understand the whole tool kit and have the ability to run a case which includes delegation of responsibilities and the ability to foresee what partners require. To do this, the firm needs to equip its consultants with the necessary managerial skills.
- Growing the firm - the biggest risk is that you give people bad advice. Need continuous training to bring professionals up to more senior levels and keep them there while recognizing that some people will always be better at some things than others.
- Firm has a conscious balance between the ability to grow without sacrificing quality. PD skills development are a large part of this.

Professional Development - Opinions

[NON CLIENT-FACING: Some professional and business service leaders have told us that firms will increasingly seek some kind of recognized credentials from their non revenue-generating leaders in marketing, business development, operations, finance, HR or IT.]

2a. What is your opinion of this statement?

Non Client-Facing Current Leaders

- R20 General hesitation – two major considerations:
- There is increasing pressure for nonrevenue-generating professionals (marketers) to consider ROI metrics in proving their value – this is true for consulting, but even more true for lower paying sectors of the professional development industry like architecture).
 - She would be interested in learning more about this concept if it would help her and her firm be more competitive.
- R21 This would not be important to leaders in her firm - they are more interested in:
- Demonstrated success in prior jobs.
 - MBA from brand name schools (an advanced degree, even in professional services, would be less important).
 - Personal fit - ability to negotiate with and navigate relationships with 45 different internal clients.

Non Client-Facing Future Leaders

R22 BCGs hiring standards are high – they focus strongly on credentials. This includes marketing and support staff – they seek out MBAs and other credentials. This has always been the case at BCG.

R23 It is not true at the Hay Group at this time. This might be necessary for future growth but the economy has taken its toll on them and PD is generally considered too time consuming and expensive.

2b. Would this increase your likelihood of seeking an additional credential?

Non Client-Facing Current Leaders

R20 See above.

R21 Maybe - if it was from a brand name school but would depend on content, professors and networking benefits. Biggest concern would be taking two weeks off - possibly if spread out over two months.

Non Client-Facing Future Leaders

R22 Yes. Getting this type of credential would show that someone like her, a manager with 14 years experience, has the personal drive and desire to undertake additional education to get to the next level.

R23 Yes - he is still interested in growing his skills, especially because he is on the nonrevenue-generating side of the business.

[CLIENT-FACING: Some professional and business service leaders have told us that their firms will increasingly seek practitioner-managers whose credentials set them apart from “home-grown” leaders.]

3a. What is your opinion of this statement?

Client-Facing Current Leaders

R24 Sometimes this might be true, but not at her firm. This would not be relevant to a former senior executive at S4 Consulting with 20 years of experience.

In the eyes of a client – it does not matter that she has a PhD (or any other degree - her clients may or may not know this). It might be considered an entry point but the only important thing is the value she can bring to her clients. “A certificate that says ‘I am a good consultant’ is meaningless.”

R25 **They should do this. I generally agree with this sentiment. There's a reason for the home-grown nature, rightly or wrongly.** Professional service firms view that they have kind of unique culture and values, and business models. They worry about people who **didn't grow up in that environment. How effective they can be**, my previous employer has a founder bias. The people you can really trust are with the firm they nurtured.

This idea is indisputably for CFOs, say, but less sure that it's true for general managers or CEOs. For these leaders, the "culture" bias kicks in the most.

Client-Facing Future Leaders

R26 This is unlikely within the company - they have a different model. Home-grown leaders accounts for a lot at the company. **"Partners are the best of the best." Same sentiment for the company's direct competitors.**

This is more likely within management consulting firms that do not have the same level of PD capacity within the firm.

Interviewer side comment: "Bartending school - you can easily go to bartending school and learn how to make drinks but when you go to get hired, all they want to know is if you've tended bar."

3b. **Would this increase your likelihood of seeking an additional credential?**

Client-Facing Current Leaders

R24 No.

R25

Client-Facing Future Leaders

R26 N/A

Cross-Sector Institute Discussion

The creation of a cross-sector Center, Institute, executive education course, certification and/or graduate degree program on professional services leadership (i.e., competencies to more effectively direct, steer, manage and/or grow a professional or business service firm, including marketing and selling). This type of Center would be aimed at anyone who has or desires to gain decision-making responsibilities for the firm's growth, competition and survival.

A Center like this could:

- **...offer an array of choices for growing one's skills: short customized executive education sessions; formal certification credentials; and/or an executive master's degree.**
- **...conduct and/or support cross-sector research, conferences, case studies (and other data) on the emerging and best practices of firm growth, management or leadership.**
- **...be housed at a University, but it might also be free-standing.**
- **...support and/or extend an Association's credentialing and/or research agenda.**

Initial Reaction

Non Client-Facing Current Leaders

R20 Great idea – intriguing. Would be interested in attending. There is not much good information available on these concepts except:

- Important books on this concept includes David Maister's book, *Managing the Professional Services*.
- Thomas de Long *When Professionals Have to Lead* and Suzanne Lowe's *Marketplace Master's*.

This will overcome a gap in this area – it would be best to base it at a university because there is a pre-existing marketing platform.

R21 Good idea - it would add credibility and skills enhancements to marketing professionals in this industry.

Target audience - a degree program might not be that important if one already has an advanced degree.

- Targeting future leaders that **don't already have advanced degrees might be the best approach.**

Non Client-Facing Future Leaders

- R22 Loves the idea.
She would examine the program and write her business case to BCG. She still feels this would not enable her to go into a Director level role at BCG but potentially at other firms.
- R23 Interesting - **he didn't see any focus on profession services firms in his business school marketing courses**. They were all focused on B to C materials. He is not sure of any other organization that offers this although the AMA might offer something similar.

Client-Facing Current Leaders

- R24 Could be helpful for some firms.
There is a similar "Institute for Sales" where people go for the learning, not the credential.
This idea seems to focus on getting credentials – the focus should not be on credentials, it should be on improving performance – this is the crux of the issue!
- R25 Applies to the industry in general, but at specific firms I worry about how a McKinsey person would view such a thing. When I hear certification in conjunction with professional associations, I think of the difference between a CPA and a banker. The word **"certificate" seems to apply to the bottom half of a pyramid in a profession, not the top half.**
Bottom / top half = across the set of professional service firms, there are prestige issues. There are lots of professional service firms that think they are above average, but they are not. The challenge is not whether there is anything to learn (there is), but what is the right level of professional.
(Certification) seems like it has trade school feel to it. This is at odds with the notion of a senior level.

Client-Facing Future Leaders

- R26 Executive education intrigues him the most - he is not sure what courses people take or what they teach but is aware of them through reading the Economist and his experiences at a previous company. These programs appear to be targeted towards senior executives from well-regarded schools (like Harvard's one or two week executive programs). **They appear to be specialized and offer lots of value to participants.**

4a. What elements are most important or attractive?

Non Client-Facing Current Leaders

- R20 Collecting cross-industry best practices.
Will help people move outside of their niches or areas of specialty.
University based would be attractive from a customer point of view.
The ability to choose your own courses.
- R21 Networking with peers - this is perhaps the most important aspect.
Cross sectors - sharing best practices with other industries could be very valuable.
Needs to be local.

Non Client-Facing Future Leaders

- R22 Great to have a university affiliation but need a free-standing component as well so people can do things on their own without having to commute.
Professional services firms are all run similarly and have the same challenges – this would help address them all together.
Face-to-face interaction.
- R23 The cross-sector component is especially interesting in that it allows people to learn from best practices in other industries. Case examples from the legal or high technology professions might be valuable in management consulting - you can always learn from different perspectives.

Client-Facing Current Leaders

- R24 Focus on professional services.
Working with talented professionals from other disciplines.
Having different industries represented will create a blend of experiences that will benefit everyone.

R25 **There is a lot of favorable reaction to David Maister's books. The notion that knowledge and learning of that type could be imparted there than through one guy writing books. I have not read a lot of other books on the professional service firm topic. Maister's books have a real world feeling to them. He has spent a lot of time with large law firms, etc. He is savvy about executive level issues.**

What would be right personally: exec-level.

There should be ___ for education in the functional areas in PSFs, like finance or marketing. But it has to be routed toward the executive level.

If you didn't have the confidence that what was being trained could be based on observation and research for the executive level that would undermine it.

Client-Facing Future Leaders

R26 This will give people on the partner track the skills they need to become partner.

4b. What elements are least important or attractive?

Non Client-Facing Current Leaders

R20 Certifications – not sure if she needs more of these but an academic degree would be different.

The potential for "bad authors" or course content.

Location – needs to be convenient.

R21 **Master's** degrees - already has enough.

Non Client-Facing Future Leaders

R22 Research, conferencing support.

Going back to school – life is busy, difficult to carve out the time.

R23 **Wouldn't want it to be too short term** - he would prefer a longer term formalized program especially given where he is in his career.

Client-Facing Current Leaders

- R24 The potential for participants to not be forthcoming because there is a risk they might give away trade secrets, confidential client data.
- R25 Certification piece. It has the sense that most industries who certify are dragging down the bottom half.

Client-Facing Future Leaders

- R26 This would not count for anything at the company - it would not add any credibility to his existing credentials. The PD program at the company is worth a lot more internally than an outside certificate, and is well regarded outside of the company - potentially just as much.

4c. What else would you like to see included?

Non Client-Facing Current Leaders

- R20 Chance to network with peers.
Resources on emerging trends in different industries – for both current and future practice areas.
- R21 Networking - classroom instruction should be included.

Non Client-Facing Future Leaders

- R22 Would like to see existing vendors and services firms demonstrate hot new concepts and best practices in the marketing and sales arenas.
- R23 Nothing.

Client-Facing Current Leaders

R24 Should be topical – should be able to move theory into practice. **There should be no “teachers”** – there should be facilitators.
Must create a “safe place.”

R25 **Which functions are we talking about ... Professional service firms may have an easier time accepting things that they can't grow in house.**

Finance, general management, and a specific issue around governance. This is less of an executive leadership issue, but it is a driver of morale. When you get the governance wrong, it has major implications. It is almost organizational design, governance design. **“Governance” is broader than just having a board; it is also distinct from executive management.** Executive management is a skill in becoming an effective leader. **Governance is the whole system of how is power distributed and balanced ... where are the checks and balances in the system? How do Professionals have a voice in the direction of the firm.**

Client-Facing Future Leaders

R26 His concerns with such a program include:

- What is the quality of the other students?
- What is the course content - how ground breaking is it going to be? It needs to be relevant and valuable for people on the partner track.
- Who is it going to be offered to - existing senior level executives, professionals making more lateral moves, etc. For job changers, would need to include a career development component.

4d. What would be a key differentiator that might result in you considering participating in one or many of the services offered?

Non Client-Facing Current Leaders

R20 The ability to customize your own curriculum.

R21 Who is leading / teaching the classes - how much can she really learn?

Non Client-Facing Future Leaders

R22 Flexibility - the ability of this program to easily accommodate professionals who travel a lot. It would have to consider professional / personal schedules.

R23 A mix of professors and industry experts who are well versed in their fields.

Client-Facing Current Leaders

R24

R25

Client-Facing Future Leaders

R26 At the company - if they pay and it adds value.

Need to consider whether you market this to companies or individuals (he was interested in knowing that Interviewer went to Columbia Business School completely at the expense of previous employer and that there was likely a strong marketing relationship between Columbia and large banks, accounting firms, etc. The program was called the "Summer MBA Program" and was focused on future leaders that the bank didn't want to lose.).

Course content would need to give professionals a "leg up" over others.

4e. What content areas or topics do you see as being most critical for your professional development?

Non Client-Facing Current Leaders

R20 Social media.
Measuring ROI.

R21 Sales, business development skills.
Negotiating and influencing skills across an organization.

Non Client-Facing Future Leaders

R22 Selling marketing concepts to senior leadership at BCG.
Partners are everything at BCG – they are the best of the best and are total over-achievers. They do not have the confidence in **their own abilities, nor the support functions' abilities**. Once they accomplish a major goal, they immediately look for the next big thing – "it is never enough." They are professional and treat people well on the outside but there is a "guilty until proven innocent" mentality.

- This program would help her build business cases to help sell marketing ideas to a potentially skeptical group of senior executives. It would help her develop the confidence and leadership skills to understand how to interact with and work with them.

R23 Marketing skills and leadership.
Some finance and accounting would be nice too.

Client-Facing Current Leaders

R24 "Business Relationship Management" (not CRM).

- Emerging concept that entails managing interfaces between groups or teams and large companies.
- Used to be managed by salespeople.
- Academics are challenged by this type of relationship management and need education in it – there are sociological issues like self awareness, group/relationship skills.

R25

Client-Facing Future Leaders

R26 Not sure - need to consider that many programs already exist (speaking largely, but I believe not exclusively, of MBA programs) that offer concentrations in marketing, etc.

4f. What delivery formats would you most prefer?

All face-to-face workshops/courses at the employer site.

All face-to-face workshops/courses in a university.

All online.

Hybrid with face-to-face workshops and follow-up online content.

Non Client-Facing Current Leaders

R20 Hybrid – mostly in person but some online learning makes sense as it could speed up the learning process.

R21 Hybrid in-person and online.
In-person networking.

Non Client-Facing Future Leaders

- R22 Hybrid preferable.
Should not be at employers site – too many distractions and too small of a staff for in-house training.
Webinars could work too.
- R23 Prefers face-to-face with some online component but only when necessary.
Face-to-face components are especially necessary at the beginning and the end of any program.
If an online component would allow this to be done with a more prestigious university, he would be fine with a greater proportion of online delivery.

Client-Facing Current Leaders

R24

- R25 Hybrids are more and more viable. In many ways preferable. Professional service people are very busy. Carving out a week is a lot.

Client-Facing Future Leaders

- R26 Hybrid - A mix of online and personal instruction.
Purely online - **can't do it all online, you need networking opportunities and wholly online programs seem to have less value.**
There is an impression that to have greater value, you need an in-person element.

4g. What credentialing, if any, would you consider?

Master's degree

Certificate – what kind?

Other credentials

Non Client-Facing Current Leaders

- R20 Certificates are less important than degrees – her firm is an academic firm so degrees mean much more than certificates.
- R21 Executive education certificate.

Non Client-Facing Future Leaders

R22 Master's.

R23 Either a degree or a certificate but would lean toward the former.

Client-Facing Current Leaders

R24 See Q1h.

R25

Client-Facing Future Leaders

R26 CFA, CPA, etc. These licenses are considered a big deal and in some ways they are worth more than an MBA given their specialized focus on technical skills. They are also required to be kept up to date - this adds credibility.

4h. What time commitment would be most appropriate and feasible?

Frequency of courses/workshops

Length of time for credential (if applicable)

Non Client-Facing Current Leaders

R20 A day a month if the firm sponsors it. A half day if I sponsor it. Week long if the firm sponsors it.

R21 Two weeks would be difficult.

Two-week time commitment spread out over two or three months might be feasible.

Depends on what is going on in office at any given moment - sometimes can be very difficult, other times easier.

Non Client-Facing Future Leaders

R22 Two - three years – or the same as an MBA.

Two - three nights a week or potentially over the summer – despite work / personal demands – anyone mid-career profession who is driven enough would take the time.

- R23 Something like the time required for an Executive MBA but not full time.
Three-month time commitment with one - two weeks of learning time spread throughout.
- One - two Saturdays a month for six hours per session

Client-Facing Current Leaders

R24

R25

Client-Facing Future Leaders

- R26 This depends on the target audience and how far reaching the degree or certificate is.

5. What would be the pros and cons of such a Center (program, certification, etc.) being housed at a university?

Non Client-Facing Current Leaders

- R20 Needs to be off-site – out of the office.
Branding...“good housekeeping seal” already exists.
Existing resources – lets you access a large educational community and take advantage of other offerings.
Would likely be more expensive – both from an existing infrastructure and potential travel perspective.

- R21 Pro - being housed at a university would add credibility. Aligning with existing leaders is important, especially in the management consulting industry - this is true with older partners, maybe not so much with newer generations (she is basically getting at the status factor of pedigree degrees).

Non Client-Facing Future Leaders

- R22 Pros:
- Brand name.
- Cons:
- Potential travel to get there.

- R23 Pros:
- Added credibility and better to put on your resume.
- Cons:
- Location (if other than Philadelphia) - this could be overcome with an online component.

Client-Facing Current Leaders

R24 Free standing would be best but a university would give more credibility.

R25

Client-Facing Future Leaders

- R26 Pros:
- Brand "halo" - a degree, certificate or license with "MIT's" stamp on it count for something.
 - Access to school's resources.
- Cons:
- Wouldn't want it to be a purely academic program - needs to have a real world component. Universities do a good job at partnering with firms that give them this component.

6. What kind of university would be attractive to you?

Brand name schools versus lesser-known names

Big versus small

State university versus private

Already-demonstrated services-focus versus not

B-schools versus college of professional studies

Non Client-Facing Current Leaders

- R20 Brand name schools – might have a slight advantage but there are plenty of lesser well-known schools that can do an equally good job.
Big vs. small – no difference.

State vs. private – she would generally choose private over state but there are some great state institutions (University of California system).

Service focus – A professional services focus would be preferred.

R21 Brand name.

Non Client-Facing Future Leaders

R22 Brand name more important.

Big / small – **doesn't matter**.

State / private – private more prestigious in the past, now many well-regarded state institutions. She would prefer a state institution if it cost less (and was coming out of her pocket).

R23 Brand name over non-brand name.

Size doesn't matter.

Public / Private - **doesn't matter**.

Business Schools over schools with professional services focus as it would add credibility and would have access to better faculty.

Client-Facing Current Leaders

R24

R25 Prestige and brand name is a factor. I think **it's such a new area that I can imagine a lesser known B school could make a name** for itself. There is fluidity especially in B schools. Rotman School in Toronto is now known favorably. Other B schools are going into expertise in a particular area.

Also it could be attached to a law school or some kind of department. Provided you get the kind of consensus around professional service credentials. **Similar to Harvard's negotiation project.**

Client-Facing Future Leaders

R26 Brand name – important.

Big vs. small - **doesn't matter** (small example = Babson).

State vs. private - **doesn't matter** (state example = UCAL Berkeley).

7. What would be the pros and cons of such a Center (program, certification, etc.) being located in a big city (probe for Boston, Chicago, DC or NYC?)

Non Client-Facing Current Leaders

- R20 Pros:
- Other fun activities - both job related and not.
- Cons:
- Expense.

- R21 No cons.
- Pros:
- No travel for most (i.e. if Boston).
 - Access to large volume of participants.

Non Client-Facing Future Leaders

- R22 Pros:
- Ease of access
- Cons:
- Travel

- R23 Pros:
- Lots of industry practitioners are located in cities and would become involved in the program.
- Cons:
- Commute (if other than Philadelphia).

Client-Facing Current Leaders

R24 Pros:

- Access.
- Diversity.
- Different points of view.

Other considerations:

- Which city?
- East coast vs. west coast?
- Nice to go someplace where you can think.
- Ease of transport.

R25

Client-Facing Future Leaders

R26 Big cities are a big draw but smaller cities can hold their own - sometimes people who work in big cities like to get away from them. Most important thing is the quality of the program and ease of access.

8. Do you have any final thoughts?

Non Client-Facing Current Leaders

R20 This is an intriguing idea – “the questions you have asked are nuanced and you can tell there is a well-thought out idea behind them.”

Interested in learning more – and might like to be involved.

Professional services firms are generally owner led businesses. Owners passionately invest in their firms but often do not know how to run a business – this would help.

R21 Cost will be a driver - she would not pay for this personally. **Regardless, cost can't be too high, especially when you are marketing it to a cost center (i.e. a nonrevenue generator).**

Non Client-Facing Future Leaders

- R22 Could have the primary location at a university in a big city with lots of branches.
She would “want it all” in this type of program.
When can she sign up?

R23

Client-Facing Current Leaders

- R24 McKinsey hires the smartest people in the market and trains them to become consultants. **They learn to believe that “this is the best way to do it because we’re smart.”** This model is flawed because people leave.

This type of institute sounds like a great idea but in reality, it would need funding, sponsors, etc. – who would sponsor it? It would lack impartiality.

- Whoever puts up money for it would wield a disproportionate share of influence so it’s not generic anymore.
- This is the same issue as universities have – anyone who donates a sizable amount of money may have an agenda. The university has to follow this agenda in order to keep the investors happy.

It’s a good idea, but is it practical? There are a lot of universities that would say they already have institutes like this. Wharton, Andersen School of Business (UCLA), Harvard Extension School are examples.

- R25 Sounds interesting.

Client-Facing Future Leaders

- R26 Interested in hearing how this program develops - interesting idea.

Biggest questions:

- Target market
 - Types of individuals to market to:
 - People who plan to stay at one firm for a long time.
 - People who want a competitive advantage over their peers.
 - People who want to make lateral moves.
 - Types of firms to market to:
 - Large management consulting types of firms represent a challenge.

- Smaller firms don't have the organic capacity to create internal PD programs - how do you segment this market?
- What educational value will be offered and how will it help an individual move up the ladder?

9. Do you have any questions for me?

Non Client-Facing Current Leaders

R20 E-mail follow up questions / comments.

R21

Non Client-Facing Future Leaders

R22

R23 He asked about what type of person would be admitted into this program and we discussed the various attributes of different levels of experience at different sizes of firms. He thinks attendees should have a minimum of ten years of experience regardless of what size firm they come from.

Client-Facing Current Leaders

R24

R25

Client-Facing Future Leaders

R26 See above.



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