

Mentoring Up: How Marketers Coach Their Principals
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A skilled marketer who is aligned with the firm's goals and feels passionate about his work can make an incredible contribution. "The firm is more successful when marketers are plugged in to where the firm is going, and we're helping principals achieve their goals," says David Koren, one of the marketing professionals interviewed for this article.

I asked five senior marketing professionals to share their experiences in working with and advising senior principals. Together we explored a number of questions trying to define the ingredients for success in a mentoring relationship between a marketer and a principal. This article is the result of those conversations. It examines successful approaches marketing professionals can take when mentoring or advising senior-level principals in their firms.

Normally we think of mentoring as a one-on-one relationship in which both parties have agreed to work toward a certain set of goals. We usually envision the mentor as more experienced and more powerful than the mentee. When mentoring occurs between peers or when the mentor's position in the firm is junior to that of the mentee, is the mentoring process different? The answer seems to be *yes*, in that mentors who are either peers or in a less powerful position compared to their mentees describe themselves as *advisors* rather than *mentors*.

Furthermore, the mentoring of principals tends to be an informal process. Even when the principals invite the process and set individual goals, the work on those goals must be done in the context of the firm's business. Principals don't have much time and their needs are all different. Steve Heckel's approach is typical. "There's an informal give and take. We discuss things. I ask questions in order to be able to help them accomplish the marketing task, get background, know where the client is coming from. We work out potential solutions together."

But the foundation for all successful mentoring relationships—whether they be the traditional *senior-to-junior* or the less traditional *junior-to-senior*—is the same: the roles are clear; there is mutual respect and a shared vision.

Laying the groundwork

Everyone interviewed agreed that trust is the essential ingredient for a successful mentoring experience. They also agreed that trust takes a long time to build, even if the marketer/mentor was hired as an expert to help the firm's principals increase their marketing knowledge and skills. So the first question is "How do we build trust, especially when we are new to the firm?"

When Linda Crouse was hired as a principal at BAR, she built trust through one-on-one discussions with each of her fellow principals. "I used stories of what has and has not worked in the past. I also did whatever I said I was going to do—that was critical in building trust and respect with the other partners."

When David Koren was hired as the marketing director at Gensler, he wanted to show that he could provide intelligence that his principals didn't have. "I did a lot of research on the internet to gain intelligence. So if they were going after a certain client, I could say, 'Oh, did you know about the merger? Here are the details on the people you're meeting with.' It gave me instant credibility."

All of the marketing professionals interviewed for this article said they approach their principals—as well as others in their firms—as partners. "I didn't say I had all the answers. I posed questions instead and allowed the person to think about the question, what might work, what he or she wants to accomplish so that we could then discuss the goals or methods and together find the approach that was right for the individual," said Linda Crouse.

Steve Heckel, Marketing Manager at HACBM Architects, Engineers and Planners, talks to principals about something that interests them. "It's the same way we talk

with clients about their projects. We work out potential solutions together, accomplish things as partners.”

Lisa Crossett, a vice president at ESA, always lets her fellow principals know that she is going to help them realize their goals. In doing that, she often helps them shape those goals. In her role she can offer a broader perspective than the firm’s technical principals may have.

Why Do Mentoring Efforts Fail?

Failures happen for a variety of reasons. If trust and mutual respect have not been established, the mentoring relationship will never get off the ground. Beyond that, the failure may be one of communication. A number of those interviewed mentioned the importance of clearly defining roles and expectations. As David Koren explains, “Collaboration works well only when each person knows what he’s supposed to do. The marketer needs to clearly define his role—am I a translator helping you translate an idea into writing, or am I a coach looking at what you’ve already got and saying, ‘What if you did this?’ Or am I an advisor?”

It’s important, also, to pay attention to how you are being perceived. Linda Crouse listens for people’s joking remarks about her, because she wants to ensure her remarks are not being perceived as overly critical, but constructive—that they are viewed as a goal that the person can achieve. She, like others interviewed, also adapts her approach as the relationship progresses. “If something isn’t working you need to try a different style or even a different person in the mentor role.”

Effective communication also requires the ability to present ideas in relation to your principal’s values. One individual talked about a very skilled marketing manager, highly respected by her department, who never was able to win the trust of her firm’s president. She never realized that she simply wasn’t speaking his language. She spoke in terms of product marketing—*cash cows, dogs, brands*—instead of putting those concepts into a context the president could relate to. He dismissed her advice because it was “too textbook.”

Another offered the example of a marketing manager who showed no interest in the firm's business. "She was interested in marketing, but not in marketing the company. The principals didn't see any value in her knowledge. If they had recognized the benefit to the business, they would have been receptive and had respect for her."

Nancy Guinther, Vice President of Marketing at BBI Construction, described her own learning curve in communicating with the firm's partners. "I had to learn the best way to approach them. I learned not to go too fast. At first I gave them all *don'ts* without understanding how they work. But I learned to step back, hear them first, then offer suggestions. I didn't try to change them dramatically." Because they appreciated Nancy's listening to them, they were ready to listen to her.

A number of those interviewed talked about enlisting the help of others to explore ideas before presenting them to the decision makers. "Internally, I seek council with others—testing ideas. It also ensures others, who typically may be quiet, are more likely to voice their opinions in meetings, which leads to fuller discussion of the ideas," Linda Crouse explained.

A mentor/coach always needs to remember that the purpose is to build mentees' confidence along with their skill and understanding. Tell them what they are doing well before offering suggestions to augment their strengths. And, as Nancy Guinther says, we need to know when to back off. "I learned not to expect immediate results. I had to learn each person's personality and work in a non-threatening way. Now they seek me out. We meet at a regular time every week—discuss strategy and in the process I give the principals feedback."

Ingredients for Success

In order to successfully mentor the firm's managing principals, everyone interviewed agreed on these basic ingredients:

- Know who they are; know their business; then let them know that you know.
- Be an expert in your field, but don't over-emphasize your own discipline; meet them on their own ground.
- Take time to establish trust. Without it the principal will not be receptive to your advice or feedback.
- Listen and understand how the individual learns—by example, through discussion, etc.—and what her strengths and weaknesses are. This will allow you to work in a positive way—bolstering the principal's strengths.
- Make it a win-win process. Understand what's important to them and deliver it.

When it is successful, what is the value to the firm?

When a marketer successfully mentors the firm's principals, it allows everyone in firm to grow and develop. The firm more easily adapts to change, finding fresh approaches and creative solutions. As people get smarter about what they're doing, they become more effective. In addition, they inspire change in others.

"For a principal it's energizing to see exciting fresh solutions," says Lisa Crossett. Ultimately, of course, as principals and others expand their knowledge and skills, the value to the firm can be seen in the bottom-line. "Success breeds success."

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