The Essential Partnership:
How IT and Marketing/BD Can Drive Results Together

By Gordon Braun-Woodbury, Marketing Operations Consultant at Calibrate Legal

Once upon a time, not so long ago, a law firm business development manager came across a blog post advertising a new cloud-based digital marketing solution. The functionality promised to solve one of her problems, the subscription price was within her monthly expense limits, and only a credit card was needed to complete the transaction. She clicked the button.

A few days later she received a call from one her firm's IT managers asking about the purchase. He was abrupt, to say the least. He wanted to know the reasons for needing the software, who had approved it, whether a security review had been requested, whether going-concern due diligence had been completed on the vendor, and how the software fit with the Marketing department's other priorities. Was she aware that the same functionality was already available in another piece of software that IT expected to release shortly?

Interactions like this one are not uncommon these days and in every industry, including law. IT and Marketing/BD leaders – CIO and CMO – report difficulties in working together, in collaborating on projects, in competing for resources, even understanding each other's language. The CMO's mandate –driving the firm's growth in a competitive marketplace– seems

to conflict with the CIO's mandate of improving productivity, protecting information, and managing technology risks. To oversimply the situation: Marketing tends to judge IT as a bureaucratic barrier to innovation; IT tends to judge Marketing as a source of chaos, stress and risk.

The CIO/CMO divide has long been a fact of business life. But today, bridging that divide has become an imperative. Consider the following:

• *Share of Tech Spend*: Gartner expects 2018 to be the year when CMO-led spending on technology exceeds the amount the technology spending controlled by CIOs across all industries. Law firms may not be there yet – but the trend is clear.

• *Data Avalanche*: According to a recent McKinsey report, "worldwide volume of data is growing at least 40 percent a year, with ever-increasing variety and velocity." And that data can be a competitive advantage: McKinsey finds that data-driven companies are 5% more productive and 6% more profitable than their peers.

• *Proliferation of Digital Solutions*: Over the past seven years, according to Chiefmartec.com, the number of available marketing technology solutions has grown from 150 to over 5,000. Today the average law firm is using 17 marketing technology solutions – many of which are cloud-based and can be purchased with a credit card.

• *Complexity*: While many martech vendors profess that their solutions will simplify life for marketers, implementing these solutions (and establishing business processes to use them) can be highly complex. The complexity is

CIOs and CMOs Talk About Collaboration Challenges

The CIO viewpoint		The CMO viewpoint	
42%	Marketing teams cannot be trusted to operate technology as they tend not to have the skills	43%	The technology development process is too slow and not aligned to the speed of digital marketing
50%	Marketing often pulls in technologies without proper consideration for IT standards and architectures	42%	I need my department to be enabled to operate the content, data and experience management technologies without IT in the middle
49%	Marketing teams do not understand the complexity of integrating new data sets	40%	My IT team does not understand the urgency with which I need to integrate new sources of data to address market conditions

Source: *Cutting Across the CMO/CIO Divide*, Accenture, 2014

magnified when you consider requirements to integrate data from a suite of marketing tools so that it can be analyzed for insight.

These factors are driving the need for a much more robust business partnership between IT and Marketing in law firms. Each side needs to recognize that, due to the digital business revolution, their mandates have expanded – and are more interdependent than ever.

- *The Law Firm CMO's* growth mandate now demands the intelligent application of technology. This requires CMOs to understand the power of data and recognize the business opportunities and risks that it creates. Further, the CMO must be technology literate – able to articulate a clear vision for how a technology investment will drive revenue.

- *The Law firm CIO* cannot be indifferent to the overall strategy of the firm, including its growth. Effective CIOs have long understood the need to collaborate with the CMO on his/her mission, because that mission is terribly important.

So how can these two critical business functions work together more effectively in a law firm? What are best practices to create a solid IT/Marketing partnership? To find out, we interviewed a group of Marketing and IT leaders from professional services firms. Here's what we heard:

Seek Role Clarity: IT and Marketing/BD leaders need to agree on their respective roles in moving the firm forward. Neither can own the technology space by themselves; both serve the same client (the firm and its partners), and must rely on each other to do that.

The CMO's proper role is to answer the "what and why" questions: what are we trying to achieve; why is this opportunity important to our firm and partners? The CIO addresses "how and when": how can we best meet the objective and manage the risks, with what resources and in what timeframe?

- One CIO we interviewed documents an annual CMO/CIO service level agreement that defines each leader's accountabilities and expectations of the other for the coming year.
- Another requires that Marketing take full responsibility for understanding the upgraded features and functionality being added to the marketing software they have implemented.A third focuses on educating his CMO (and other C-Suite peers) on the firm's IT architecture, the reasons behind it, and the costs and business risks involved in deviating from it.

Several of the leaders we interviewed agree that "tone at the top" is an essential part of defining the roles of Marketing and IT. In other words, the firm's leadership should expect and demand collaboration from the two functions.

- ***Broaden and Deepen Relationships***: While the IT/Marketing partnership starts with the CIO and CMO, it needs to extend much more deeply into both organizations. IT and Marketing professionals need to consult, communicate and collaborate with each other on projects and initiatives. Some Marketing and IT leaders use a formal, structured approach to encourage these relationships – for example, assigning one or more

relationship managers on their team to act as interface with their opposites on the other team. Others are less formal, relying on regular inter-team briefings and joint attendance at practice group meetings to cross-pollinate ideas, and create mutual understanding of attorneys' needs.

- **Bridge the Language Gap**: It's often observed that Marketing and IT people speak different languages: words vs numbers, qualitative vs quantitative, market focused vs process focused. While that may be true in very general terms, within any marketing/BD organization there are people who are fluent in tech and data – just as you'll find people interested in marketing in any IT organization. These team members can be extremely valuable as "interpreters" -- people who can moderate discussions between IT and marketing, who can identify business needs in attorney meetings and translate them into technical requirements.
  - As one CMO noted, serving as an interpreter can be a valuable career-building experience for an up-and-coming marketer who is interested in IT.
  - Several of our IT leaders agree on the importance of a consistent Project Management methodology to help bridge the language gap between IT and marketing. Some CIOs find that the Agile/Scrum approach, which focuses on rapid delivery of working prototypes, is easier for marketing teams to understand and follow than traditional project methodologies.

- **Create an Investment Roadmap**: Opportunities for applying technology to Marketing/BD are growing exponentially – but

enterprise-wide tech investments are expensive and generally don't pay back within one year. Most IT leaders are quite accustomed to this reality, and are very good at creating multi-year business cases for funding large technology purchases. Marketing leaders need to tap into this expertise, if they are not doing so already, to ensure their operational funding requests are approved.
  - One of the CIOs we interviewed offers a roadmapping service to all internal clients, including Marketing/BD, to help them create three-year ROI-based business plans for acquiring new technology.
  - Another works jointly with his CMO to create comprehensive, financially based business cases for major technology expenditures. CMO and CIO work hand-in-hand to justify the business case to the firm's executive committee

- **Reinforce Annual Planning**: If the IT leaders we interviewed agree about one thing, it's the importance of a structured planning process to their teams' success. All of them work hard to engage Marketing in annual business planning and project portfolio management -- and to commit IT resources against the Marketing projects in the planning pipeline. Marketers who do plan for the year ahead, and account for the IT support that will be required or their plans, tend to have a much more positive experience in getting their needs met. The goal should be to achieve a reasonable balance between planned initiatives and on-demand support.
  - As one IT leader acknowledged, it's not realistic to expect that 100% of Marketing's requirements from IT will be

planned in detail – but neither is it realistic for Marketing to be completely open-ended and ad hoc about their requests.

- ***Learn About Each Other's Differences***: Marketing and IT face different types of challenges, and these differences can undermine their partnership. Marketers tend to be driven by short-term concerns – their success is measured by their ability to respond creatively to fast-breaking market opportunities. They have a "need for speed." IT professionals generally work on a longer horizon – for example, they often focus on the execution of large projects within budget, and protection of systems and data from security threats. They have a "need for certainty." Rather than quickly judging the other's behaviour, both groups need to consider each other's realities in their interactions.
  - As one of our interviewees noted, a little tension between Marketing and IT is not necessarily bad– if the two groups work to understand each other's point of view, it can lead to better results.

So, rather than stay in their corners, both sides need to respect the other's expertise and consult with each other on decisions wherever possible. With the right conversation, the dreaded "No" response from IT can turn into "Yes – with certain conditions." And, by engaging IT in an upfront discussion about business requirements, the marketer will likely get an even better solution than she had envisaged.

- ***Become "Thought Partners"***: Advances in technology and proliferation of data are creating huge opportunities for IT and Mar-

keting to become "thought partners" who collaborate on projects and goals for the greater good.

That is particularly true if the CIO is also responsible for the firm's knowledge management (KM) function. One of our technology leaders described how KM has moved away from manually maintained databases to automated services that mine the documents and time entries lawyers create in their daily work. The automated systems create a critical mass of data, and a superior experience for the lawyers who use them

That learning can be extremely valuable to a CMO. A marketing function that relies primarily on voluntary contributions of marketing data from busy lawyers can easily become an exercise of pushing a very heavy rock up a very steep hill. But by leveraging the data that already resides in the firm's documents and systems, much of this manual work can be eliminated.

Also, the CMO can help direct the CIO's priorities away from back-office projects and instead to the creation of tools that will delight the lawyers, and particularly the partners. Not only will that make the IT department more popular within the firm, but the IT staff will feel more energized, knowing that their work is now fully appreciated by the firm's lawyers and is fully in sync with firm strategy.

In a legal services market rich with innovation and new sources of data, a solid Marketing/IT partnership is critical to realizing growth opportunities. Staying ahead of the evolving legal

landscape calls for adaptability and collaboration from every corner of your firm. There's no question that law firm leaders who foster collaboration between these two groups and department heads who embrace these partnerships will reap the rewards.

About the Author
Gordon Braun-Woodbury, Calibrate Legal's Marketing Operations Consultant, focuses on measuring business services functions in order to align internal systems and enhance their performance.

His methodology helps to establish a definitive return on law firms' human capital investments, which ultimately results in actionable intel that can and should inform future strategy. His career includes more than 30 years at KPMG Canada, where he was in-volved in virtually every aspect of managing a major professional services firm. Most recently, Gordon was responsible for building and leading the Marketing Operations function at KPMG. In this role he led the implementation of a complex CRM system, personally created a firm-wide digital marketing strategy and measurement scorecard, and oversaw a Centre of Excellence for Proposals and Pursuits.

Gordon is also an award-winning corporate communicator who is highly attuned to the dynamics of the partnership culture. He is comfortable working with senior executive teams to uncover their true business requirements, build consensus, create business-focused solutions, and manage organizational change. Gordon holds a BA and MA from University of Toronto. In addition to his business career, Gordon is a jazz pianist and educator. He resides in Toronto, Canada with his family.

IT and Marketing leaders interviewed for this article

Jerry Justice
CIO Benesch LLP

Glen Brookman, CIO
KPMG LLP (Canada}

Andrew Jurczyk, CIO
Seyfarth Shaw LLP

Jeanne Hammerstrom
CMO Benesch LLP

Marc Wilson
Technology Director
Goodmans LLP

Evelyn Dempsey
Head of BD and Marketing
Bereskin & Parr LLP

Jeffrey Rovner
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