

DIGITAL
DIGITAL
MARKETING
MARKETING
SOCIAL SELLING
CONTENT
MARKETING
MARKETING
MILLENNIALS
CORPORATE
NARRATIVES

THE BARE NECESSITIES

The more things change,
the more they stay the same

PM Forum Annual Conference – 27 September 2018



pmforum

Insight and inspiration for
professional marketers

Many years ago, the legendary advertiser Bill Bernbach said...

“

**HUMAN NATURE HASN'T CHANGED FOR
A MILLION YEARS. IT WON'T CHANGE IN
THE NEXT MILLION YEARS.**

**ONLY THE SUPERFICIAL THINGS HAVE
CHANGED.**

”

As marketers, we often focus on the superficial. On what's new. What's changed. What we're told is going to change.

~~AT ONE POINT OR ANOTHER
VARIOUS TOOLS AND IDEAS
LIKE DIGITAL MARKETING, SOCIAL
SELLING, CONTENT MARKETING,
MILLENNIALS AND CORPORATE
NARRATIVES HAVE ALL BEEN~~

~~THE NEXT BIG THING TO~~

GIVE US A COMPETITIVE EDGE.

But more often than not, the way to gain an advantage is to focus on what hasn't changed. To pay attention to what was the same. What is the same. What will stay the same.

For marketers, that means returning to the basics.

Having a marketing strategy grounded in insight. Remembering that creativity is crucial to standing out. Recognising that what's right for the short term may not be right for the long term.

Acknowledging that, ultimately, we are here to help our firms sell more of whatever it is they provide.

THIS YEAR'S PM FORUM CONFERENCE WILL FOCUS ON WHAT HASN'T CHANGED.

This year's PM Forum conference will focus on what hasn't changed.

Through keynote presentations and workshops, we will explore what really influences people to buy and how you can exploit it. We will inspire you to be more creative, sharing what professional firms can learn from the best marketing in other industries.

On top of that, we'll give you the confidence to prioritise the things that do work and say 'No' to the things that don't work. All supported by a solid strategy, the right tools and evidence collected through years of research.

Delivered by award winners and recognised industry experts from in-house, client side and agency side, this year's PM Forum conference represents a rare opportunity to think about the timeless fundamentals that will really make you and your firm more successful.

WE'LL
EXPLORE
INFLUENCES,
INSPIRE
CREATIVITY
AND
SHARE
EXAMPLES

FOR MARKETERS, WE OFTEN FOCUS ON THE SUPERFICIAL, ON WHAT'S NEW, WHAT'S CHANGED, WHAT WE'RE TOLD IS GOING TO CHANGE. AT ONE POINT OR ANOTHER VARIOUS TOOLS AND IDEAS LIKE DIGITAL MARKETING, SOCIAL SELLING, CONTENT MARKETING, MILLENNIALS AND CORPORATE NARRATIVES HAVE ALL BEEN THE NEXT BIG THING TO GIVE US A COMPETITIVE EDGE.

WHAT'S NOT THE WAY TO GAIN AN ADVANTAGE IS TO FOCUS ON WHAT HASN'T CHANGED. TO PAY ATTENTION TO WHAT WAS THE GAME, WHAT IS THE GAME, WHAT WILL STAY THE GAME, TO THE GAME, WHAT WILL STAY THE GAME.

FOR MARKETERS THAT MEANS RETURNING TO THE BASIC. HAVING A MARKETING STRATEGY GROUNDED IN INSIGHT. REMEMBERING THAT CREATIVITY IS CRUCIAL TO STANDING OUT. RECOGNISING THAT WHAT'S RIGHT FOR THE SHORT TERM **ON** NOT BE RIGHT FOR THE LONG TERM.

ACKNOWLEDGING THAT ULTIMATELY WE ARE HERE TO HELP OUR FIRMS SELL MORE OF WHATEVER IT IS THEY DO.

Conference programme 2018

9.00

Breakfast and registration

9.25

Chair's introduction

**Lucy Canning,
Grant Thornton UK**

9.35

**The behavioural
biases that influence
why people buy:
What they are and
how to use them**
**Richard Shotton,
Manning Gottlieb OMD**

Before you can influence decisions, you need to understand what drives them. Kicking off the conference, Richard will explain how human behaviour is shaped by psychological shortcuts.

Drawing on evidence from academia, real-life advertising campaigns and his own original research, Richard will demonstrate how a variety of behavioural biases affect why people buy.

By understanding what these biases are and how they work, you'll see the implications for professional firms and how to use them to improve the effectiveness of your marketing efforts.

10.15

**A masterclass in real
marketing: From
strategy to ROI**
**Heidi Taylor,
Heidi Taylor Marketing**

What is marketing? Is it still about the 4Ps? Does the concept of identifying and solving client needs profitably translate to professional services? Basic questions perhaps, but how many professional firms actually do proper marketing?

Heidi will explain why we need to stop being distracted by tactics and go back to the fundamentals of what marketing's really about. She'll give you the confidence and knowledge to build a foundation that will set your marketing up to be as successful as possible.

10.55

Coffee

11.25

**When the world zigs,
zag: Why your
marketing needs to
be more creative**
**Tom Roach,
BBH London**

We all know that meaningful differentiation is notoriously difficult to achieve in the professions. This means our marketing has to work even harder to help our firms stand out.

Although creativity and professional services aren't always the easiest of bedfellows, Tom will show you why original thinking in your marketing is absolutely critical to your long term success.

Using examples and cutting-edge research, he will demonstrate the impact that creativity and marketing have on growth and brand recognition in the short term and over the long term.

12.05

Morning breakout sessions

Your first choice – either stay in the main hall for the Overview option or select one of the five workshops (for in-house marketers/BD only).

Overview

BUILDING A LAW FIRM FROM THE BOTTOM UP: A RAINMAKER'S STORY

Stephen Gold,
Stephen Gold Consulting



Sometimes you just need to hear from someone who has been there and done it. Here, Stephen Gold – law firm founder, rainmaker and trusted adviser to law firm leaders – will share with you:

- What it really takes to build a successful professional services firm from the ground up
- What makes senior stakeholders sit up and acknowledge the value of business development and marketing
- How best to overcome resistance and engage partners directly with the practicalities of winning new business

Workshops

A. WRITING TO SELL: THE WHAT, WHY AND HOW

Eileen MacCallum,
A Wee Birdie



Marketing is all about writing informatively and instructively – or so many partners we work with would have us believe. We know it is really about wooing with words.

Join this session if you want to learn:

- How to make your writing more creative and persuasive – whatever the topic
- How to ensure colleagues understand the different types of writing you produce
- Practical tips for writing pitches and marketing materials people actually want to read – online and offline

B. BUDGET MARKETING: HOW LONG IS A PIECE OF SHOESTRING?

Helen Burness,
Saltmarsh Marketing



Big talk from big companies is all very well some of the time, but what happens when the resources aren't available to you?

This workshop will be perfect if you:

- Work in a smaller firm where budgets are tighter and other resources aren't easily available
- Are expected to work across different marketing disciplines and time is at a premium
- You want to know how to prioritise the right activities to have the biggest impact

C. CLIENT VALUE PROPOSITIONS: FROM ME TOO, TO JUST FOR YOU

Susanne Pugsley,
PSBD



Too often the propositions we take to our clients are little more than me-too lists that could apply to anyone.

Find out how to build a meaningful proposition that:

- Really gets under the skin of what is actually most important to the client or prospect
- Moves you noticeably beyond easily-replicable points of parity to meaningful points of relevant differentiation
- Clearly demonstrates the value you'll add to the client or prospect and how you'll do it

D. BLURRED LINES: ON THE SCREEN OR ON THE PAGE, IT'S ALL MARKETING

Kent Valentine,
Draw Group



You don't need a digital marketing strategy. You need a marketing strategy that includes digital and online channels – if they're right for your objectives.

Here you'll learn how to:

- Maximise the impact of your online marketing by integrating it with your other marketing activities
- Create a vibrant digital eco-system and invest the right resources in the right places
- Measure the real impact your marketing has and avoid being distracted by meaningless metrics

E. EFFECTIVE BRAND MANAGEMENT: THE LONG AND THE SHORT OF IT

Nicky Purnell, Menzies
Nicola Webb, Implementor



A rebrand is one of the biggest projects most marketers will face. But what comes after you go live is just as important as what came before.

This workshop explores:

- Getting everyone inside the firm ready to bring the brand to life outside the firm
- Making the most of the initial impact to create the right perception about the firm
- Managing and measuring the long-term consistency and awareness of your brand in your chosen markets

13.05

Lunch

14.00

Genius steals: What we can learn from the best campaigns in other industries

Brian Macreadie, Bryan Cave Leighton Paisner

Inspiration is everywhere if you look for it. But too often we convince ourselves that professional services is different and can't learn anything from other industries.

In this session, a serial-award winning professional services marketer will dispel that myth, sharing some of the best business campaigns from the wider world. He will talk about what makes them so powerful and the common threads that link them.

Afterwards, you'll be inspired to look for ideas in places you wouldn't have considered before.

14.40

Afternoon breakout sessions

Another choice to be made - either stay in the main hall for the Overview option or, for in-house marketers/BD only, select from the same list of workshops as in the morning (see pages 8 and 9).

Overview

Performing at the peak: Personal development for marketers

Meirion Jones, Client Critical

Marketers often have to balance a wide range of responsibilities and demands on their time. This session will give you practical guidance about how to handle the challenges of:

- Making the time to do everything you need to as well as you possibly can
- Keeping up with your own personal development alongside your day-to-day responsibilities
- Not burdening yourself with jobs you shouldn't be doing that add unnecessary stress and pressure

Workshops

A. Writing to sell: The what, why and how

Eileen MacCallum, A Wee Birdie



B. Budget marketing: How long is a piece of shoestring?

Helen Burness, Saltmarsh Marketing



C. Client value propositions: From me too, to just for you

Susanne Pugsley, PSBD



D. Blurred lines: On the screen or on the page, it's all marketing

Kent Valentine, Draw Group



E. Effective brand management: The long and the short of it

Nicky Purnell, Menzies Nicola Webb, Implementor



15.40

Tea

16.10

Panel discussion: Being noticed by the people that matter

Moderator: Lee Grunnell, Thirteen

Client panel includes:

Andrew Lane, Finance Director, Surrey County Cricket Club

Elaine Hutton, EU General Counsel, Shiseido Group UK & Ireland

You can't sell something to someone who doesn't know you exist. So one of the primary jobs for the marketing function has to be building awareness amongst the people you want to sell to. Then, you need to ensure they know the right things about you.

Sounds simple, but we know that in the world of professional services, it's anything but. With a resistance to the traditional advertising techniques used in every other industry, how do you win precious mental availability in your target market?

16.50

Chair's closing remarks

17.00

Drinks reception

Including Gin Bar sponsored by Conscious Solutions

18.30

Conference closes

REMEMBERING THAT CREATIVITY IS WHO'S TO
STANDING OUT. RECOGNISING THAT WHAT'S RIGHT
FOR THE SHORT TERM MAY NOT BE WHO FOR THE
LONG TERM.

Helen Burness

Helen has held senior marketing roles at a number of diverse firms such as Eversheds Sutherland, Hardwicke Chambers and NewLaw pioneer, Halebury. As the founder of Saltmarsh Marketing, she specialises in helping small professional services firms make the most of their marketing resources and infrastructure.

Lucy Canning

Lucy is Director of Brand, Marketing and Communications at Grant Thornton UK and has worked in professional services marketing for 15 years. She works alongside Grant Thornton's CEO and the firm's Strategic Leadership Team, with responsibility for developing the marketing and brand strategy, and overseeing its implementation.

Stephen Gold

Founding Golds Solicitors at 32, Stephen was at the heart of growing it to 500 people and building its reputation as one of the UK's most innovative law firms. He is now a trusted adviser and non-exec to firms throughout the UK and Ireland.

Lee Grunnell

Lee is the founder and brand strategy director at Thirteen. A former in-house marketing director, he now works with professional services firms to help them articulate, communicate and demonstrate what makes them distinctive.

Elaine Hutton

Elaine is GC at Shiseido for the Dolce & Gabbana, NARS, Laura Mercier and bareMinerals cosmetics brands. She worked for Clifford Chance before beginning her in-house career at Channel 4, followed by FremantleMedia, Paramount Pictures and Apple, where she was Head of Legal for its retail business in EMEA.

Meirion Jones

Meirion is a Meyler Campbell certified consultant, trainer and coach to senior stakeholders in professional services firms. A former in-house marketing director, he now uses a variety of proven techniques to help organisations achieve high-impact leadership, mindset change, client service innovation and performance growth.

Andrew Lane

Andrew is Finance Director at Surrey County Cricket Club which he joined ten years ago from London Wasps. Prior to moving into the sports industry, he worked in finance roles in the music business with Warner Music and Universal Music.

Eileen MacCallum

Copywriter Eileen has worked as an in-house marketer for small and global companies, writing about everything from accountancy and computer software to the arts. So she knows how businesses need to speak – and sell – to their clients.

Brian Macreadie

Brian is the multi-award winning Head of Brand & Campaign Marketing at Bryan Cave Leighton Paisner. A three-times judge at the B2B Marketing Awards, he was named the Most Creative Individual in B2B Marketing at the 2017 B2B Marketing People Awards.

Susanne Pugsley

Susanne is a former in-house marketing and BD director, with more than 25 years' experience working with partners at professional service firms of various shapes and sizes. She now specialises in developing business development strategies and propositions that help firms stand out.

Nicky Purnell

Nicky is the Marketing & BD Director at national accountancy firm Menzies. Responsible for the firm's overall growth strategy, she helped Menzies win the National Firm of the Year Award at the 2016 British Accountancy Awards.

Tom Roach

Tom is the Managing Partner, Performance at BBH London, one of the world's most famous creative advertising agencies. He's responsible for the effectiveness of BBH's work and has led the strategy for brands such as Barclays, Deloitte, KFC, McDonald's, Waitrose and Weetabix.

Richard Shotton

Richard is the author of *The Choice Factory: 25 Behavioural Biases That Influence Why We Buy*. He is the Deputy Head of Evidence at Manning Gottlieb OMD and a regular contributor to *Campaign Magazine*, the *Drum* and *Marketing Week*.

Heidi Taylor

Heidi is a senior marketing strategist and former winner of the Marketer of the Year and Professional Services Campaign of the Year awards at the CIM Marketing Excellence Awards. She is the author of *B2B Marketing Strategy: Differentiate, Develop and Deliver Lasting Customer Engagement*.

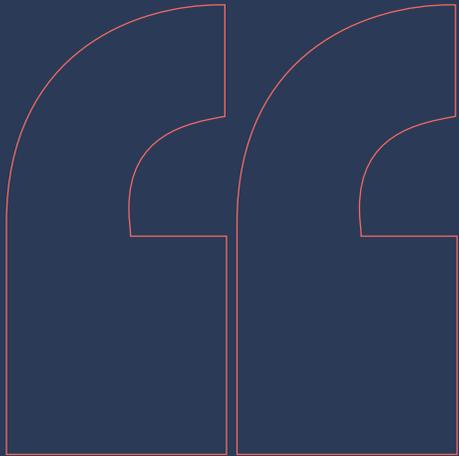
Kent Valentine

Kent is a director at Draw Group and describes himself as a digital polymath. As well as working with global brands such as American Express, Nokia, Qantas and Sony, he's also pioneered research into the effectiveness of digital changes in various professional services sectors.

Nicola Webb

Nicola founded Implementor in 2003 and has worked in professional services and business-to-business marketing since 1983. She specialises in strategy and marketing planning, and devising and implementing client relationship management and business development programmes.

What are people saying?



I STILL FIND MYSELF REFERRING BACK TO MY NOTES FROM LAST YEAR'S CONFERENCE, TO THE INSIGHTS I GAINED AND THE IDEAS THEY SPARKED.

THE PM FORUM CONFERENCE IS MY CPD FOR AN ENTIRE YEAR!

IT INSPIRES OUR FIRM TO UP OUR GAME EACH TIME WE ATTEND. THE BENCHMARK YOU ARE HELPING TO SET IS PAVING THE WAY FOR SUCCESS IN THE FUTURE.

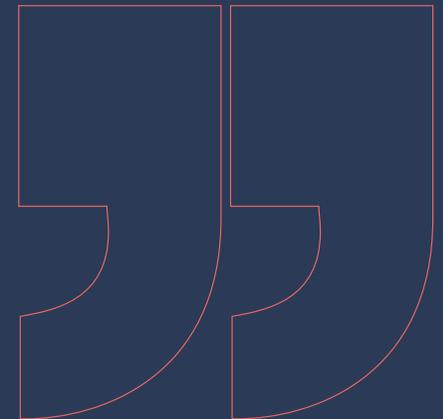
I FOUND THE CONFERENCE HIGHLY VALUABLE – IT'S INSPIRED ME TO MAKE A FEW CHANGES IN THE WAY I WORK.

LAST YEAR'S CONFERENCE REALLY HELPED TO MOTIVATE AND INSPIRE ME TO TAKE A NEW DIRECTION, BOTH PERSONALLY AND PROFESSIONALLY.

IF I ATTEND NO OTHER EVENT THIS YEAR, I WILL MOST DEFINITELY BE RETURNING TO THE PM FORUM CONFERENCE

THIS IS THE CONFERENCE TO ATTEND IF YOU ARE A SERIOUS PROFESSIONAL SERVICES MARKETER

THE PM FORUM EVENTS VERY MUCH SET THE BAR ON WHAT CONSTITUTES BEST PRACTICE.



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