



# Sharpen your client focus

Creating advantage in a  
competitive environment

22nd PM Forum Annual Conference  
28 September 2017, London

The past year has been one of political upheaval and economic uncertainty. With Brexit, Trump and elections across the EU, it is unlikely we will see clarity in the near future.

Closer to home, within professional services, the disruptive environment shows no signs of a let-up. A mix of mega-mergers, implosions, new business models, new technology and new client buying patterns contribute to the ever-increasing challenges faced by our firms.

However, whatever the source of confusion and unpredictability, or the level of severity, we must never lose sight of our clients, their needs and their expectations. Keeping them front and centre ensures a clear focus for everything we do as professional marketers. This is not only good business practice, it creates advantage in an increasingly competitive environment.

The client experience remains paramount, so every touchpoint, however small, needs attention. Central to this is a joined-up approach to delivery, to ensure firmwide service exceeds client expectations. This only comes from a full understanding of our clients, their markets and their competitors.

Meanwhile, technology continues to make life easier. As marketers, it enables us to stretch our limited resources, work smarter, and target clients and markets more acutely. From the CRM system through to the latest AI technology, as these tools become embedded within our marketing activities we need to understand what is available and how to exploit it effectively to achieve advantage.

These remain exciting times for those with the capability and foresight to grasp these challenges and turn them into opportunities. Marketing is the core business driver that underpins all interactions with clients. With a direct impact on the bottom line, it is essential to the ongoing competitiveness and financial success of our firms.



## CONFERENCE PROGRAMME 2017

09.00

Breakfast and Registration

09.25

Chair's introduction

**Graham Munday**  
*Hydrock*

09.35

The future is now

**Andrew Grill**  
*IBM*

If asked when they envisage disruptive change will take place in professional services, people tend to believe it is always at least five to ten years into the future. Some think the future is two to five years away. But the future is already here and we are living in it. So what do professional services in the digital age look like and what are we doing to ensure we stay out in front of the competition rather than being left behind?

10.15

Client focus:  
Delivering the superlative  
client experience

**Anna Lind**  
*JLL*

How well do we really know our clients? What does good KAM look like and how do we develop fee earners to engage in effective account management? A key element is ensuring there is a relationship management framework that is understood across the business and which encourages information flow between client teams and the wider organisation, underpinning execution of a superior client service. Anna will share insights into best practice at JLL, runners-up in the *Best co-ordination in winning new work* category of the MPF Awards for Management Excellence 2017 for their KAM activity.

10.55

Coffee

11.25

Competitive advantage:  
Our clients in an  
international context

**Allan Evans**  
*BDO*

The competitive landscape is very different to even five years ago, with clients and markets becoming increasingly sophisticated. Understanding where our key strengths lie as a firm, where we want to compete and where we should compete are the first steps in building competitive advantage. In the modern digital environment most domestic clients can become global overnight, whilst many businesses will have at least some international element within their operations. But are we prepared for how we will respond? Who we target as a client, and how we do so, needs a refocus... through an International lens.

# 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.

### Overview option

#### Personal effectiveness as a marketing tool

Daniel Priestley  
Dent

As a Key Person of Influence (KPI), you and your fee-earners can raise the bar in marketing your firm, your insights and yourselves. Firms that allow people to develop into a 'face of the brand' are likely to thrive as their people are better able to attract opportunities and maintain the highest standards. In this session, Daniel will discuss how to develop the KPIs within your firm, through a five step implementation plan:

- 1 Pitch
- 2 Publish
- 3 Product
- 4 Profile
- 5 Partnerships

Each attendee of this session will also be given a copy of Daniel's book *Key Person of Influence*.

### Workshop options

#### A | Client listening programmes

Charlotte Green

Client listening programmes are core to understanding client needs and developing existing relationships. Done well, they can also form the foundations for developing your CRM and business development activities to build on those existing relationships whilst also developing relationships with future clients. This session will show you how to:

- design your programme
- implement effective projects
- effectively exploit the intelligence gathered

#### B | High performance teams

Paul Amit

Your firm's strategy is set, your marketing and business development strategy is set, but is your team development strategy set? This session, aimed at senior BD and marketing professionals, will look at the key ingredients of successful teams and how they can be developed to achieve organisational, team and individual objectives. It will also help you to understand:

- how to build a team encompassing all the skills of modern marketers – whatever its size
- how your team needs may develop over time
- how to align the needs of the business with your team members' individual goals

#### C | Successful pitching

Anne Blackie  
Grant Thornton

The key elements of a successful pitch include building trust and rapport with the client, while understanding their business and personal needs, and how they buy. You also need to invest time and effort to prepare your submission and deliver a winning presentation. This session will include insights into:

- successful pitch preparation
- what is needed to ensure your pitch process engages both the client and internal teams
- how to make your business win by standing out

#### D | Using emotional intelligence

Jo Emerson

Emotions and emotional intelligence (EQ) are often seen as the softer end of people development and marketing. Yet research shows how important emotions and vulnerability are. Learning to listen and understanding our own emotions, and the choices we make in building relationships, are equally important. This session will explore how we can use emotion to:

- be more effective when dealing with people
- deliver more effective marketing strategies
- build more powerful relationships with clients

#### E | Driving your digital marketing

Simon Marshall  
Borges Salmon

Professional services marketing has moved into the digital age, but is your firm keeping up, giving your clients what they want and how they want it? This session looks at techniques for implementing your digital marketing strategy. Simon firmly believes that we learn more from our mistakes than easy successes and will discuss:

- five key mistakes to avoid
- key tips to employ for success
- changing mindsets to create a digital culture within your firm

# 13.05

Lunch

# 14.00

**Human vs Machine:  
Cognitive automation and  
AI – are we nearly there yet?**

**David Gilroy**  
*Conscious Solutions*

These are exciting times for marketing. Automation tools and AI technology are enabling us to harness our CRMs like never before. We can stretch existing budgets and achieve better ROI than ever before, whilst delivering greater focus and efficiencies. But what is the true state of AI? Are the robots really about to take over the world and make us obsolete? David will cut through the hyperbole to provide insight into exactly where we are.

# 14.40

**Afternoon Breakout Sessions**

Another choice to be made – either stay in the main hall for the Overview option **or** select from the same list of workshops as in the morning (see pages 4 and 5).

**Overview option**

**Ideas into Action:  
Marketing strategy –  
planning, building,  
execution**

**Robert Camp  
and Mandy Reynolds**  
*Stephens Scown*

Effective marketing strategies begin with a strong plan, underpinned by clear understanding of our firm's goals and a focused execution. All three elements are vital for commercial success. Robert and Mandy of Stephens Scown, winner of three MPF Awards in 2017 – *Best Managed National Firm*, *Best Leadership of a Mould-Breaking Firm* and *Best Corporate Culture* – will take you through these key elements, how to identify each and how to combine them seamlessly.

**Workshop options**

**A | Client listening  
programmes**  
*Charlotte Green*

**B | High performance  
teams**  
*Paul Amit*

**C | Successful  
pitching**  
*Anne Blackie  
Grant Thornton*

**D | Using emotional  
intelligence**  
*Jo Emerson*

**E | Driving your digital  
marketing**  
*Simon Marshall  
Burgess Salmon*

# 15.40

Tea

# 16.10

Panel discussion:

**Making a difference:  
Achieving our business  
objectives by better  
meeting client needs**

**Andrew Rogerson**  
*Grist*  
**Plus a panel of PSF clients**

We continue to develop our communications, improve our CRM systems and employ marketing automation to hone our delivery. But is it working? Are professional services firms really meeting client needs and exceeding expectations? We hear the views from clients to explore what we could all do to maximise the opportunities for delivering greater client service through targeted thought leadership – what, when and how they want it.

# 16.50

Chair's closing remarks

# 17.00

Drinks reception

# 18.30

Drinks reception ends

## WHO'S WHO

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### Paul Amit

Paul is Chair of the MPF Marketing Group and formerly Director of Marketing & BD at Nabarro, where he was also a member of the Executive and responsible for the implementation of the firm's client and market strategy. Over his career, Paul has also held senior marketing roles at DLA Piper and Deloitte, and worked in the technology sector, supporting organisations to successfully raise their profile and pursue growth opportunities.

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### Anne Blackie

Anne is Head of Bids at Grant Thornton UK with over 20 years' marketing and business development experience in professional services. She works closely with the business, helping them with their go-to-market strategy to win and grow clients. More recently she has been involved in developing Grant Thornton's approach to creating value for strategic client relationships. She is also a business coach and facilitates some of the firm's business development programmes.

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### Robert Camp

Robert is Managing Partner at Stephens Scown, with a simple vision for the firm – to provide excellent client service and to develop and play to everyone's strengths. He sees his role as creating a positive culture of praise, encouragement and innovation – in particular when it comes to staff and client engagement. One of his proudest achievements is the creation of 'Scownership', Stephens Scown's very own John Lewis-type employee ownership model.

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### Jo Emerson

Jo is a leading Confidence Coach & Human Behaviour Expert and author of *Flying for Beginners*. She is a former BBC journalist who moved on to run a small marketing consultancy. She's been coaching since 2011 and is a member and graduate of the Coaching Academy, holding their certificate in Personal Coaching and diploma in Personal Performance Coaching.

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### Allan Evans

Allan is Global Head of Business Development and Marketing at BDO International, a member of BDO's Global Leadership team and Chairman of BDO's International Business Development and Marketing Committee. He has a team of 15 people based in Brussels and London, with another c1,000 professional marketers part of his extended 'family' in BDO member firms. His current priorities are to help BDO member firms win more international clients, further build the Global BDO brand, and digitise the client experience.

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### David Gilroy

David co-founded Conscious Solutions in 2003 to help professional service firms make more money from their online marketing. He is part human, part robot and part orange dog, so is well versed to speak on marketing automation. He's also helped over 300 firms with their online marketing in the last 14 years.

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### Charlotte Green

Charlotte is a senior marketing and business development professional with a broad base of experience in the legal sector. She was previously Head of Client Services at Nabarro with responsibility for the implementation and management of the firm's key account programme, and managed the firm's tenders, research and CRM systems teams.

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### Andrew Grill

Practical futurist, Andrew is an internationally renowned thought leader and Global Managing Partner of IBM Social Consulting. He is an expert in the fields of digital transformation and strategy, and social media networks, developing organisations' strategy in a world rife with digital disruption. An experienced corporate leader, Andrew has launched and run technology companies in Europe and Australia, and worked with organisations including Barclays, BBC, John Lewis and Unilever. He has also successfully presented at three separate TEDx events.

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### Anna Lind

Anna leads JLL's EMEA client relationship management programme. She has worked at JLL for three years and is a member of the UK Executive Board. Anna established the client care programme, driving a best-in-class approach to CRM throughout the business. Anna was previously at Norton Rose Fulbright, where she held a series of global roles in the marketing and business development team.

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### Simon Marshall

Simon is Executive Head of Markets at Burges Salmon. He is a professional services marketing and business development leader with over 20 years' of legal sector experience. He has also spent time in sales roles and in the translation and leisure sectors. He has a real passion for relationship-driven marketing and making sure that great people are served by digital and not vice versa.

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### Graham Munday

Graham is Marketing Director at engineering consultants Hydrock. He's worked in both plc and private environments, reporting to CEOs and global MDs. In addition to being a CIM qualified marketer, he's also chair of the PM Forum South West Committee.

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### Daniel Priestley

Daniel is an entrepreneur, best-selling business author and founder of Dent, a strategy and technology consultancy for entrepreneurial businesses. He started his first company at 21 and built a multi-million dollar enterprise by 25. He's since grown businesses in the UK, USA, Singapore and Australia. In 2010, Daniel co-founded a business accelerator helping over 3,000 companies to stand out and scale up. He's helped to raise millions in investment funding for ventures and hundreds of thousands for charities.

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### Mandy Reynolds

Mandy is Director of Marketing at Stephens Scown and a marketing communications specialist with over 15 years' experience, both in-house and on the agency side, devising and implementing a wide range of successful campaigns. Prior to joining Stephens Scown in 2010, Mandy was Senior Marketing Manager at KPMG in London and Bristol.

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### Andrew Rogerson

Andrew is Founder and Managing Director of Grist, an award-winning B2B thought leadership and content marketing agency focused on the professions. Prior to co-founding Grist, he was marketing director at the Economist Intelligence Unit in New York with full responsibility for marketing and business development. Andrew therefore has an in-depth understanding of the role of the marketing professional and how agencies can best help their firms, and their careers.

## TESTIMONIALS

PM FORUM CONFERENCE 2016

Single best conference I have attended in my marketing career, I was buzzing with ideas on the train on the way home, just need to find the time to implement them now!

If you're a senior marketing/BD professional the PM Forum conference is the perfect opportunity to take a step back and reprioritise your objectives. It's challenging and inspiring.

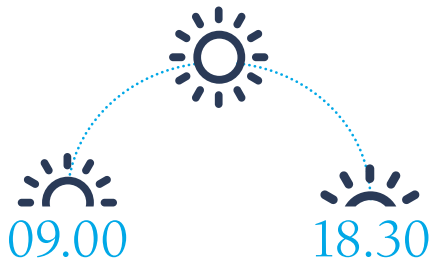
I found all of the main talks thoroughly engaging and thought-provoking and every single one had a relevance to our organisation in some shape or form. They all had points which crossed over as well and delivered a strong key central message.

The PM Forum conference is always my 'must-do' conference of the year. It's a great way to get away from your desk and think about the big picture – and talk ideas and issues through with peers in the industry. I go back to work with lots of ideas and a renewed focus on what we're trying to achieve for our clients.

It's worth taking a day out and coming to the PM Forum conference. You will come away having learnt things, having had time to think and reflect on your own role and firm and with some great ideas to take forward.

## PM FORUM CONFERENCE 2017 ALL YOU NEED TO KNOW

Thursday 28 September 2017



**Breakfast and registration**

**Reception ends**

### Venue

**Congress Centre**  
28 Great Russell Street  
London  
WC1B 3LS  
020 7467 1318

### Fee

Prior to 30 June:  
**£515 + VAT** (£618)  
  
Thereafter:  
**£615 + VAT** (£738)  
*Fee payable with booking*

### Substitutes & cancellations

Up to 18 August 2017:  
Full refund minus £85 (plus VAT) cancellation fee.  
No refund after 18 August 2017.

Cancellations must be made in writing. Substitutes are welcome. PMI reserves the right to cancel with no liability beyond refund of fees paid.

### Eligibility

The conference is open solely to members of the PM Forum and the MPF Marketing Group.

### Further information at

www.pmforum.co.uk  
www.mpfglobal.com  
  
020 7786 9786  
pmf@pmint.co.uk

### Save the date

Our 23rd PM Forum Conference will take place on:

**Thursday 27 September 2018**

## REGISTRATION FORM PLEASE RETURN THIS FORM, ALONG WITH YOUR PAYMENT, TO:

### PM Forum

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020 7786 9786  
[conference@pmint.co.uk](mailto:conference@pmint.co.uk)

### Breakout sessions

Please mark two sessions (1 for first choice, 2 for second choice) for both the morning and afternoon:

	AM	PM
<b>Ov</b> Overview option		
<b>A</b> Client listening programmes		
<b>B</b> High performance teams		
<b>C</b> Successful pitching		
<b>D</b> Using emotional intelligence		
<b>E</b> Driving your digital marketing		

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