

# The effective marketing and business development PA/Secretary

Beginners level

The Covid-19 pandemic has had a dramatic effect on the work of marketing and BD teams. Marketing and BD secretaries have been thrust into the limelight to take on even more responsibilities. This half day session provides the knowledge that is required to work effectively in marketing and BD teams – both with colleagues and fee-earners. Whilst basic marketing theory is covered during this digital session, there is plenty of opportunity for participants to work with each other to share ideas and experiences.

## Topics covered

Why choose PM Forum training? See overleaf...

### Introduction and aims

#### Understanding the professions and partnership culture

- What is a profession?
- Culture – Why marketing in the professions is different
- History of marketing in the professions

*Exercise: Working in the professions*

- How different fee-earners approach BD/marketing
- Why secretaries have an advantage
- Sectors and the marketing matrix

#### Introduction to BD/marketing theory

- What is business development? What is marketing? How is it different to selling?
- Pipeline and opportunity management
- Common marketing/business development activities (the communications toolbox)
- Links between brand, service and client care
- Segmentation
- Client relationships: the shift from traditional to digital methods

*Exercise: Impact of Covid-19 on marketing and BD*

#### Developing your role

- What does the marketing/business development department do?
- CIM: Professional marketing qualifications and skills
- Expanding your role and responsibilities

*Exercise: Supporting your fee-earners*

*Summary: Jargon buster*

## Eligibility

This training course is open solely to member firms of the **PM Forum**, a worldwide group of over 3,000 marketers in professional services firms. Visit [www.pmforum.co.uk](http://www.pmforum.co.uk)



## Tuesday 1 December 2020

The half-day online workshop takes place from 9.30 to 13.00.

The workshop is aimed at secretaries, personal assistants and those with limited marketing knowledge. It is suitable for those who are joining the marketing team or who have a partner requiring more marketing support. It will also prove useful to those who are new to the professions.

**To facilitate interaction, workshops are restricted to 18 attendees.**

## Trainer



**Kim Tasso** has worked within and for over 200 professional partnerships in the legal, accountancy and property sectors for over 20 years and continues to do so as a management consultant.

She also has direct client exposure from working with organisations in the technology, education, creative, media, real estate and not-for-profit sectors and through her work with a leading business school.

Unusually, she combines psychology, marketing and business qualifications so is effective both as a professional trainer, facilitator and coach and also as a subject matter expert in a variety of strategy, marketing, selling and relationship management topics.

She is highly rated as a trainer and coach for lawyers, accountants and surveyors and also lectures on Chartered Institute of Marketing (CIM) professional marketing qualifications for Cambridge Marketing College.

She is the author of books on growth strategies, business development, media relations and business development and a prolific conference speaker and journalist. She is commissioning editor for *PM* magazine.

Further information at [www.kimtasso.com](http://www.kimtasso.com).

## Why PM Forum training?

Courses are designed and delivered by **qualified and experienced professionals** who:

- have substantial experience working with both **senior fee-earners and marketing/business development professionals** in large and small professional service firms across the **legal, accountancy and property industries** as well as a variety of client markets
- have psychology credentials and many years' experience in **learning and development** to ensure an optimum learning experience
- are **subject matter experts** in strategy, marketing, selling, client relationship management and interpersonal skills who continue to practice and are therefore familiar with the latest developments

And delegates receive a **productive learning experience** because:

- There is a balance between knowledge transfer and active learning through **interactive discussion** and group exercises
- Courses are highly **experiential** – where idea sharing and networking are encouraged
- As well as copies of the presentation material, courses also include work sheets and **supplementary materials** with guidance for further learning. Some courses have exclusive booklets tailored to the needs of delegates
- Course leaders are experienced coaches with experience in **career development** and certificates of completion are issued for use in Continuing Professional Development (CPD)
- Dialogue can continue after training through members-only **LinkedIn communities**
- Only PM Forum members can attend events

## Venue

Online

## Fees

First attendee	£205 + VAT
Second attendee	£200 + VAT
All subsequent attendees	£195 + VAT

Prices are only for attendees booked concurrently. No booking can be confirmed without payment. The fee includes handout of workshop material.

## Cancellations/Substitutions

Due to the restricted number of places, refundable cancellations are only accepted up to one month prior to the event (a cancellation fee of £25 + VAT will be incurred per person). Substitutions can be made at any time. PMI reserves the right to cancel with no liability beyond refund of fees paid.

## The effective marketing and BD PA/Secretary – 1 December

Name ..... | Name ..... | Name .....  
Position ..... | Position ..... | Position .....

Firm ..... Type of firm .....

Address .....

..... Postcode .....

Tel ..... E-mail .....

Please pay by Visa/Mastercard/Maestro/AmEx (*please circle one*)

Cardholder name: ..... Amount: £ .....

Security

Card number: ..... Expiry date: ..... code: .....

Signed ..... Date .....

*Confirmation of booking will be sent by return along with a VAT receipt*

Please return this form to: [training@pmint.co.uk](mailto:training@pmint.co.uk)

020 7786 9786 [www.pmforum.co.uk](http://www.pmforum.co.uk)