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John P. Richter has worked with the firm's marketing group for the better part of 20 years, spending significant time helping shape CLA's marketing messages and activities the past 15 years.

"But make no mistake I'm a finance guy," said Richter, who's been with CLA for nearly 35 years. "Everything I've learned about marketing comes from the school of hard knocks. I'm not even going to pretend to be a marketing specialist. That's why we have team members; that's why we have professionals."

Did CLA have a marketing presence when you started with the firm?

We had a marketing coordinator in the beginning. I would view her more as an administrative assistant who did business development activities (no offense to her). Honestly, we didn't know what marketing was, and I think a great deal of the profession still doesn't know what marketing is. We commonly confuse business development activities with marketing. And I did, and probably still do.

Were you hesitant to work with marketing?

Not at all. I always saw them as allies, resources and experts to help us project the message. Remember, I learned early on the benefit of focused and measured marketing approaches through the school of hard knocks, and that's where the resources became an important element.

Has anything surprised you about working with marketing during your career?

It's more of a delight to understand how different a profession marketing is versus the professional accounting or finance world I come from. It was an eye opener to come to appreciate what a marketing professional can bring to the table: responses, perspective, focus, measurement.

Delight is a refreshing way to put it. What does that mean?

Helping me, helping us, helping our firm leadership learn the value marketing can bring to help build our brand and presence. It's important because of the creditability it can bring. The sales process is the sales process, the client will get the deliverable; but if you're not known as a firm, you start over with every relationship.

How do you rely on your marketing team?

CLA is undoubtedly the largest unknown firm (they came in at No. 8 on the 2019 Top 100 Firms). An interesting thing has happened as we have grown. There's something about the magical billion-dollar level; there's an expectation of our people, our clients and perhaps the marketplace that we become a better-known enterprise.

So how do you become better known?

We're asking the question, "How do we invest in that branding exercise?" Our marketing folks have taught us the three Cs: Clarity, Consistency and Constancy. We are getting smarter from a branding perspective because you are always building a brand, whether it's a person, industry group, local office or overall firm – intentional or not. Up to this point, that has happened at an individual level, which has built great individual brands or made us well known in specific industries but ultimately undermined the overall brand, in my opinion. We are now focused on intentionally building the CLA brand.

How can marketing have more impact?

Get to know the clients of the firm – who they are, why they buy, what motivates them. You build your brand every day with every interaction. You are constantly marketing. The best resource is our clients. Understand what we do, who we do it for, why and how they hire us, and why they stay with us. And, how those clients can help us build our brand.

What advice would you give partners about working with marketing?

View them as a professional resource. Anything you know about business development or marketing you've learned from others, classes you've gone to or competitors. A professional marketer, that's their job, their focus, so listen to them. Make them a member of the team. Secondly, raise the expectations of your marketing team. The easiest answer is to tell them what to do; the hardest thing is to listen to them and trust the advice they're giving you.

How can marketing professionals elevate their relationship with partners?

The working relationship: make it easy for the partner. Sometimes I find people are waiting for me to give them the answer instead of proposing the answer and offering the direction. Don't just be an order taker.