



Scharrell Talley Jackson
Principal/Chief Operations Officer at BPM, LLP

After serving for more than 20 years as a partner, chief financial officer and chief operating officer of Squar Milner, Scharrell Jackson took the helm as principal and COO for BPM LLP in California — just as the U.S. economy was sidelined by the COVID-19 pandemic. Jackson says BPM's business strategy of putting people first is helping the firm find opportunities to support its staff and clients during these unprecedented times.

To what do you attribute your success in creating firm growth during good times and bad?

Often when the stakes are high, we don't want to take risks. Likewise, when profits are high, we do not always think about preparing for the storm. When it comes to decision-making, I try to deal with the facts rather than my feelings. Leaders must be resilient and stay focused on the end game. For me, that's my clients and my team members. Business leaders should recognize when to pivot, and if we make a mistake, we have to give ourselves some grace and move on.

Where does the marketing department fit into that growth strategy?

The marketing department's role is vital in our growth strategy. Marketing establishes a partnership with our clients that does not include an "ask" but provides a "give" that can result in additional services that drop to the bottom line. I think it is a mistake when an organization thinks of marketing as overhead. In partnership with marketing, we provide our clients with professional development, client resources and critical information that support both our partners and clients in making crucial business decisions.

What role has marketing played in your firm's response to the COVID-19 pandemic?

We implemented a fully collaborative approach to the pandemic. The directors of our marketing and business development departments had a seat at the table with firm leadership and have been integral in developing our strategic direction. They have helped us define our response and communicate it to the firm. They have then built their department strategies around it. As we talked about how we could better support our clients, marketing was there to help ensure the client experience remained optimal. They developed a communication tool to check in with clients and assess their needs. Marketing is serving as our internal COVID resource center, helping staff work effectively from home, helping practice groups level up, doing webinars and playing a significant role in driving thought leadership.

Do you see the role of marketing and business development in CPA firms changing as a result of the pandemic?

I think it depends on the strategy of the firm. If the firm is innovative and forward looking, this is an opportunity for both the marketing and business development departments to support the firm by continually engaging with the clients and providing meaningful feedback to client service leaders. Marketing should continue to play the role of connector, building relationships through webinars, surveys, thought leadership, personal calls. Marketers and business developers can help their firms gain a deeper understanding of who their clients are and what they need. I see marketing as key to creating a thriving culture, supporting sustainable business practices, finding a way to scale what works and achieving financial profitability.

How can marketers raise their profile within their firms?

Speak up! You have to show AND tell. Don't settle for just a seat at the table; you deserve a voice at the table. Do your homework and be able to articulate how your contribution provides a return on investment. Show how your work impacts the top and bottom line. Also, look for opportunities when other decisionmakers are afraid and frozen. That's when you have the most significant opportunity to demonstrate how your creativity and skill can benefit your organization. Be sure what you offer aligns with what the leadership wants.

What advice would you give partners about working with their marketing and BD teams?

Partners should leverage marketing to their advantage. How much a marketer or business developer can accomplish depends on how much active participation and collaboration they have from the partners. Marketing plays an integral role in scalability. When you are focused on billable hours, look to your marketers for help enhancing your business relationships. Often, it is those soft touchpoints that provide the complete satisfaction clients want.