Alterra Group
Thought Leadership Marketing for Professional Services

EXECUTIVE Q&A

From Newcomer to Recognized Leader: How Deloitte Discovery Used Thought Leadership to Put Its Business on the Map

When discussing companies seen as true "thought leaders," it's natural to look to firms with big budgets, strong brands and well-known pedigrees in their chosen markets. However, midsize and small professional services firms, as well as lesser-known business units at larger organizations, also can use thought leadership to boost awareness, generate significant leads, and help drive the growth of the overall enterprise.

A prime example is Deloitte Discovery, a unit of Deloitte Financial Advisory Services LLP (Deloitte FAS). Deloitte Discovery's offerings help parties involved in a legal matter with "discovery," which is part of the pre-trial litigation process during which each involved party requests relevant information and documents from the other side in an attempt to "discover" pertinent facts. With more and more communications and documents now being generated, transmitted and stored electronically, technical competence has become an increasingly important skill in the discovery process. Prior to 2008, Deloitte Discovery was an emerging player in the discovery space. But in three short years, the practice has significantly expanded its presence among legal executives, resulting in increased industry recognition and double-digit revenue growth in an industry increasingly hungry for consulting and technical advisory.

A major contributor to Deloitte Discovery's growth has been the practice's thought leadership marketing program, which was established by Marketing Manager Alan Numsuwan. Under Numsuwan's leadership, this program continues to help make Deloitte Discovery a name that is gaining in prestige and respect among the legal community around the world. In recognition of its achievements, the program received an *ITSMA 2011 Marketing Excellence Diamond Award* in the Driving Business with Thought Leadership category at the 18th Annual ITSMA Marketing Conference in October 2011.

Recently, Alterra Group Partner Bernie Thiel spent some time with Numsuwan discussing the challenges he faced in marketing a specialized business unit within a larger, more well-known organization, why thought leadership marketing was the natural choice to form perceptions, and the measures he uses to gauge the results of his team's efforts.

Bernie Thiel: Let's start at the beginning. What were the main challenges you faced when you took on marketing Deloitte Discovery?

Alan Numsuwan: There were two big business challenges for Deloitte Discovery. One was building recognition and credibility in the marketplace. The other was that, at the time, the discovery market was focused on lower prices and not on the quality of the service. The practice also lacked a broad marketing plan, and had few supporting materials. From an eminence perspective, our professionals were not out in the marketplace demonstrating the type of strategic and forward-thinking that Deloitte so often represents.

Alan Numsuwan

BT: Why did you determine that thought leadership marketing was the right approach in this situation?

AN: In learning about how we were providing value to our clients, I noticed the ones that were benefiting the most were the ones that addressed their discovery challenges in a proactive and strategic manner versus a reactive manner. To set ourselves apart from competitors and leverage the consultative brand strength of Deloitte, we used thought leadership that was focused on client-facing issues like improving defensibility, balancing risk and cost, and overall process improvement.

A thought leadership program would help the practice be seen as true advisors to companies. And if we did it right, business would come to us because we've built up credibility—particularly for companies that are progressive about their discovery operations. That's one of the traits we're looking for in a client.

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BT: So what did you do?

AN: One of the first things I did when I came to Deloitte was meet with the practice leaders. Then I tried to meet as many senior practitioners as possible and get a sense of their personalities. In those discussions, I was trying to understand not only what I can do from a marketing standpoint, but also to gauge who I can put in front of an audience, who would be able to write, and who was in alignment with what I was trying to do with my marketing plan. If they were indifferent, then I was also trying to get their buy-in for what I was trying to do. As these leaders were potential content providers, I wanted to make sure they were not going to treat marketing as just something that we do, but something that brings value to the practice.

I also did lot of research about issues and industry trends. One example is that we held a series of roundtables in which we got clients in a room with their peers to just talk about how they were handling issues and what they were doing to prepare for them. We were there just to listen, provide answers when asked, and foster the conversation. Roundtables are one of the better ways to understand what is really bothering our clients.

In addition, I did an assessment of our own materials as well as what competitors were putting out in the marketplace. This helped me to understand whether the market was ready to accept us for what we wanted to be: an e-discovery consulting advisor. The industry as a whole was so price driven, and there was so much marketing noise in the marketplace, that companies were really struggling to find good, useful guidance and information.

Simultaneously, I reached out to media companies to find out what they had to offer and how they could help me achieve my long-term goals. That helped me to figure out where to invest.

BT: In your presentation at the ITSMA conference, you mentioned the importance of creating an "idea network" as part of your thought leadership program. Can you talk a little bit more about what's involved in that and how you approach it?

AN: An idea network is useful to keep track of who "owns" particular issues in our organization and who to go to for insights on those issues. I think in many companies, the traditional way of doing thought leadership is that a practitioner comes to the marketing person and says, "I have this idea; I need to tell everybody about it." And the marketer says, "Okay, let's do that."

Instead, I worked with the practice to identify the issues that were important to clients and prospects. We then assigned people to own and develop the content around those issues, and approached it in a way that made sense for the market. That way, content is not coming from out of the blue; but there was some rationale behind the distribution.

The idea network is also a way to put some strategy behind a marketing calendar. Instead of just tracking that we have a white paper in September, a webcast in October, etc., we can specify the reasons why we are talking about these issues at these times. Plus it's a good management tool for the plan as a whole.

BT: What are the main elements of your thought leadership marketing program?

AN: Surveys are a great way to show that we are in tune with the market. Personally, I've found that checklists and short, helpful tips are really popular. White papers also are good tools, especially in our market. Corporate legal department folks generally like to have something on paper to read. The challenge is making sure that white papers and point-of-view papers are focused and not pitching something. And speaking, of course. Getting in front of the right audience and demonstrating knowledge and the ability to advise on a topic has been very valuable.

BT: What role does your website play in this whole process?

AN: Great question. Deloitte's website is very advanced and very good for posting content. For example, for our Consulting subsidiary, we have a lot of material there, and we know companies come and download them. And that's great for Deloitte Consulting LLP, because they have a reputation and the brand recognition, and companies know to go to the website to learn more on the issues they address. For FAS and Discovery, it's a little bit different. Deloitte might not be the first resource to think of when someone wants to learn more about those issues.

To get out in front of our target audience, I worked closely with *Law.com*, which is a leading place to go for legal issues and has a good reputation among people interested in discovery. In addition to our own website, *Law.com* hosted our content and tracked those who downloaded it. This partnership allowed us to reach our prime audience while giving us valuable market data.

BT: Two other channels or activities I want to touch on: e-mail marketing and social media. What role do both of those play in your program?

AN: E-mail marketing through companies like *InsideCounsel, Corporate Counsel,* and *Law Technology News,* which have niche subscriber bases, has been very valuable as lead-generation tools because it gives us reach into their markets where we're not as known. Social media, on the other hand, has been used as a hosting and promotion vehicle only, but that is due primarily to company policy.

In the future, if we have a change in policy, I would love to engage in a dialogue with the discovery community. As more discussion goes online, it would be good to be a participant in that sort of exchange.

BT: What would you say have been your biggest challenges setting up and running your thought leadership program?

AN: Content development, number one. The management of balancing content providers who are busy working on client projects with seeing content development through to completion is very challenging. Oftentimes, someone will say, "I could write something short on this issue; I'm the resident specialist on this." And then, when it comes time to start working on it, the response is, "Oh, I'm on with a client, and I'm out of pocket for the next three months." My tip would be try to develop two to three times more content than you need, because only one-third of the content may actually get developed.

BT: So, in other words, get a lot of stuff in the pipeline.

AN: Exactly. The second challenge is instilling consistency within the content. That is, to have a consistent message, which is to make it about the client or the intended audience.

BT: Going back to your first challenge: Do your consultants have any kind of mandates built into their management goals to participate in thought leadership and publish—as they do in academia?

AN: Yes, we do. It's sort of an intangible goal to progress in your career at Deloitte. However, at Deloitte, being "eminent" in the marketplace means more than checking off a box in your goals—"I wrote my one paper" or "I spoke on a webcast." It means, "I did a number of concerted eminence activities and I have taken measures to be recognized in the marketplace. I've gotten meetings out of it, I've gotten leads out of it, I've built x amount of dollars of business out of this."

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What's interesting is that thought leadership is not something that only senior-level people who are trying to get to the next step are interested in. I'm starting to see interest from the manager level, too. Previously, a lot of managers would just say, "Oh, I'm not qualified for that; that's usually left to senior managers or partners." Now, I'm getting managers saying, "I want to get in on the discussion. I want to meet more people in the industry. I want people to know who I am as I progress in my career." And that's a big change.

BT: It sounds like your approach has been effective in getting people more engaged in thought leadership. And that you're now a really important person to those people's careers.

AN: It's funny—I was in a meeting with a consultant talking about marketing and thought leadership, and I basically said to this person, "I'm going to be your agent.

I'm going to help get you speaking engagements and publish articles." But I also make it clear to them that they have to demonstrate something of value to the audience and not have only a sales perspective. This isn't just about filling their pipeline. This is about showing experience and knowledge.

BT: Now that you have a few years under your belt, how would you assess the results your thought leadership program has delivered. How do you measure success?

AN: From a practice perspective, we've certainly grown. Now, the natural question is, didn't marketing make that happen? The answer, I think, is no. It's a concerted effort as a whole to put Deloitte on the map in the discovery industry.

But from a marketing perspective, I can say this: In 2008, we had a handful of high-value leads. By 2010, we were able to generate more than 1,000 inquiries and qualify hundreds of actual leads—people with the right title at the right companies who wanted to hear from us. That includes people who heard us speak at conferences, attended our webcasts, and downloaded our materials, as well as random phone calls and emails.

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Here's a great example of the progress we've made: About three months ago, I got an e-mail out of the blue from a very large consumer electronics manufacturer. I asked the person who inquired, "How did you think to just e-mail the general *Discovery@Deloitte.com* e-mail address?" Up until then, it was unheard of. The person said she had talked to some people at a law firm who said, for global discovery matters, call Deloitte. That probably wouldn't have happened in 2008. The same thing goes for media and event organizers. They're now calling us and asking us to write an article or speak.

BT: That's a classic example of how thought leadership can help a company move from the "push" to the "pull" marketing model.

AN: Exactly right.

BT: So why do you think your program has been successful? What do you see as some of the main factors?

AN: One of the factors is that we continually stay on top of the pain points for our clients so we know what to address in our content. Our professionals go to conferences to speak about topics and meet with interested companies, but I also attend to listen and learn. Attending helps me to know which topics are the hottest and speak directly with the people who are there to learn. I also speak with media companies and their research groups about the next hot topics they're studying. And a lot of it comes from our leadership. Our partners, our practice leaders, are consistently on top of it because they're continuously working with clients.

I also have direct and easy access to our partners and specialists, to bounce ideas off of them and get a sense for what's going on in the industry. One of the reasons I have this access is that I attend these conferences as a content person, and not so much as a marketing person. I'm not setting up the booth and collecting business cards. I'm there to understand where the industry is headed, so I can have very substantive, content-driven discussions with our leaders. Having that kind of inroad into leadership is critical.

Writing is another big factor. I've worked with some third-party writers who have been really good and some who haven't worked out as well. Those who are really good gently challenge our professionals and help them develop their ideas—and that has really helped the practice get on board with the program. The preferred situation is when you have a really good writer working together with marketing and the subject matter advisor to put our heads together and make a great product. I give credit to some of our writers, and I give credit to the practitioners who understand what they need to do.

BT: Let's conclude with advice. Someone is starting at a practice or an organization that has really very little recognition in the marketplace and wants to use thought leadership to change that. What would you tell them?

AN: I would say, number one, know your people. It's the first step to building your idea network. You have to get close to these people. Too often, marketers just see their jobs as packaging and delivering, or implementing a marketing plan.

Number two is to understand if the market is ready to accept you as whatever you want to be perceived as. In other words, do your research upfront.

Number three is to do things with a purpose; don't just do it for the sake of doing it or because you've normally done it. If you have a purpose, you are better able to justify investments you want to make.

BT: Anything else?

AN: It is increasingly important for marketers to stay close to the money. It helps show our ROI better and talk about marketing programs in terms of financial return. And it helps protect our jobs.

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Alterra Group
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