



# Transcript – Kate Badgery-Parker

Helga Svendsen 0:00

Today on the Take On Board Podcast, I'm speaking to Kate Badgery-Parker, about what boards need to think about when considering marketing issues and making sure they stay in a strategic space. First, let me tell you a bit about Kate. Kate is on the board of a Onemda and not for profit disability services provider supporting more than 200 adults with intellectual disabilities. She's also a member of the risk and compliance subcommittee. Kate is also the vice chair and Treasurer of Marketing Women Incorporated Victoria, a small volunteer group who connect and educate marketing women. After more than 20 years in blue chip consumer service organisations including RACV and Wesfarmers insurance, Kate consults as a senior marketing manager and strategist. She helps for profits and not for profits to define marketing strategies and improve marketing performance. She also works one on one coaching and mentoring marketers at all levels. She's got a master's in marketing and formal training in coaching and group facilitation. And Kate lives in Melbourne with a rescue Greyhound who I've just met via zoom and a small grey tabby cat. Welcome to the Take On Board Podcast Kate.

Kate Badgery-Parker 1:12

Thanks for having me here.

Helga Svendsen 1:14

Awesome to have you here. And to meet the lovely Georgie the lovely greyhound via zoom,

Kate Badgery-Parker 1:19

She likes being an office dog at the moment.

Helga Svendsen 1:22

Imagine there are lots of lockdown pets, loving it. And I should say we are recording this on Friday the 10th of July. I don't usually date the recordings of podcasts but with things changing so quickly in terms of our global pandemic. I always think it's a good idea to do it. Before we talk about marketing and board, staying in the strategic space with marketing and so on. I'd love to as always dig a little

bit deeper about you. Can you tell me about your upbringing and what lessons you learned what you got up to and what the leading influences were on you.

Kate Badgery-Parker 1:54

Oh, I grew up in suburban Perth suburb away from the beach. So it was a very relaxed where I grew up, my parents were probably the greatest influence on me. They lived a fairly quiet life, especially by the time they had kids, but were interested in books and ideas. And I think from them, I picked up a real great love of learning and became a great reader. I also became interested in food and culture, and languages through my father and my mum. But it wasn't until I got to uni that I started to see the broader ideas of the world and started to think of it differently about management and business and the fact that those were areas that really interested me.

Helga Svendsen 2:35

So Kate, you're on the board of a Onemda. Can you just tell us about your journey to the boardroom there? How did you join that board? It's your first board

Kate Badgery-Parker 2:43

right? A few years ago, I became interested in the idea of sitting on a board as a way to give back and probably to build myself professionally. And I had pondered this because I thought that we're marketers don't necessarily sit on boards. It's finance and government. PayPal. And I had met you through a couple of friends and context and seen the Kickstarter stuff and the take on board workshops that you were running. And it was great because it encouraged me to think about the role that I could give and the strategic value as well as the commercial and financial skills. So as a result of doing that program and discussions with other people, I got really clear on the value that I wanted to add to boards. And I looked at various opportunities. And there were lots of people looking for marketing people to basically do the marketing or be the fundraiser are essentially a volunteer, which I was fairly clear wasn't what the board was meant to be doing. And my journey was really about finding the right organisation, but also thinking about an organisation that would benefit from somebody with my skills. And Amanda was great in that respect because they need to they work with adults with intellectual disease. abilities, that's probably not as sexy as some of the other board roles that people look at, which meant that when I applied they were excited about my application, even though, so I interviewed with them and picked up the role, and it's now three years later,

Helga Svendsen 4:15

Fantastic. So you're almost at the interview? Is it? I'm assuming it's a three year term.

Kate Badgery-Parker 4:19

Yes. Hmm. So coming to the end of your first term.

Helga Svendsen 4:23

So, Kate, you know, you're a board member, obviously, of Onemda as we've just heard, you're a marketing expert. And marketing is often one of those things that people feel they know something about, even if they don't. So I'm wondering if you can tell us, how have you led the discussion in the boardroom, about marketing and how do you ensure that it stays in that strategic space rather than getting down to tactics?

Kate Badgery-Parker 4:52

I think marketing is one of those areas that this is the hardest to do, which I know we might talk a bit more about my point with bored is really to say, it's not possible for us to do everything or pursue every marketing opportunity or idea. And I think that's, that may be something that's quite unique about marketing. But certainly it's quite a strong characteristic. And it's actually the advice I give clients and people, I coach one on one. But in order to succeed, we need to make choices. And we need to choose the right things. And that means that you can't just quickly do an idea. So for example, something might come up and go, that might be a great PR story, that somebody says, Oh, we should get some coverage for that. And yes, perhaps we should, but I don't think that's necessarily one of the numbers priorities in terms of it's very small. I think we've got a point six of a marketing person. And as a result, I go back to Well, yes, that's true. But don't you think the priority should be more of this, and that's probably where I would leave boards to guys think about priorities, not tactics and think about strategy.

Helga Svendsen 6:06

Hmm, it is one of the key roles of boards really being clear on what their purpose is, whether it's marketing or otherwise and making those decisions about where to allocate resources, really, it's a key thing for boards. So in this regard, what's the information that they need before then that will help them do that in a strategic way rather than, you know, deciding what Facebook post to put up? But to make those strategic decisions? What's the information they need?

Kate Badgery-Parker 6:33

Well, the council argues boards not actually just completed a strategic marketing review, which I've done a number of times for senior management or board members is to actually look at marketing through a strategic name. And what that really means is to ask the question, What role does

marketing need to play in order to meet the business objectives and priorities? That means what do we need to have from what's essential, as opposed to what is nice to have. And that's very much the same process that a senior marketer will go through in terms of defining the strategy for their marketing is all of the pieces of the puzzle. Well, who are our target markets? What are our options? What are the things that we're doing? And then, where if we only had limited resources, should we put our time and energy and the reality of the matter is having worked in very large organisations, and mentored marketers and small organisations and consultative, small organisations? It actually doesn't matter how much budget or resources you have, when it comes to marketing, you can't do everything. So what boards need to be better at is actually asking strategic questions and putting that strategic lens on. Can I give you an example of that?

Helga Svendsen 7:54

Ah, I would love that.

Kate Badgery-Parker 7:55

Thank you. Well, one example I came across last year was a client that I consulted to, and I was trying to really teach them to think, at a strategic marketing level, not a tactical level, there was a discussion about whether they should be on Facebook or not. That's a tactical question that I think boards shouldn't be asking. Because when you ask the question should we be on Facebook? Then the question becomes why should we be on Facebook? Well, we should be on Facebook, because we want to raise our profile. And you hear that often. And it's not a great objective, because for many small not for profits, raising your profile is actually quite specific. You want to raise it within a very specific group of people, not just the whole community, and that's not an achievement objective. So when you start to go, okay, you want to raise your profile. Why do you want to raise your profile? Well, we want to raise our profile, because we want to do better than getting money from funding bodies, and then go well, I would flip that task around and our priority is to get money from funding bodies. The question we should ask is, how can we get improve our ability to get money from funding bodies? The answer then might be something like, well, we want to increase our understanding of grant opportunities and we want to build relationships with funders. Again that when you ask the how question of that is not by having a Facebook page and the organisation that I was talking to him that that one of the juniors in many of those organisations, it is quite Junior people doing the marketing was initially quite upset that they didn't have a Facebook page. But when we actually dug it around, it actually didn't meet any of their priorities or objectives to have an active Facebook page. Facebook groups might have served one of their objectives in relation to communicating better with parents and carers of the clients. But the actual Facebook change could have consumed a huge amount of resources.

Helga Svendsen 10:01

Would we be better off if boards didn't have marketing subcommittees?

Kate Badgery-Parker 10:06

Look, I'm on the borderline of that. I am yet to see one that works really well. But I've not looked extensively. So if you know one that works really well please do, comment in the Facebook post.

Helga Svendsen 10:22

Yes, shout out Take on Board people if you're on a board who has a really well functioning strategic marketing subcommittee of the board or even just has great strategic conversations at the board level, let me know and you might be the next guest on Take on Board.

Kate Badgery-Parker 10:38

Excel. Yeah. And I guess if you look at the terms of references of subcommittees, they usually have very specific tasks to do and those tasks are quite strategic. What I think happens sometimes data marketing subcommittee level is it can get into a variable Tactical discussion with people who don't really understand the details or the context of what's going on. That's again, not to say like I suspect, a fundraising subcommittee, if the board was using their network to actually tap into the kind of fundraising opportunities that their organisation was well placed to access, then great. But I have seen it with a number of clients where a marketing and fundraising subcommittee just essentially developed tactics, and they actually do more harm than good.

Helga Svendsen 11:34

So it's a real balance, isn't it? Because I'm a big fan of having diversity on boards and diversity is on a diversity on committees as well a diversity of experience. So for example, until recently, I was on the audit and risk committee of the Royal Women's Hospital. Now, I am not the finance person, I understand finances but I'm not an accountant. And sometimes my view is having the non risk person The non finance person, the non clinical person, whatever it may be, sometimes they ask questions that are different to the people that are experts in their fields. And sometimes those questions are fabulous. How do you engage people in that? How do you? Or is it back to we just don't have marketing committees? But how do we have those conversations that draws on the expertise, even if they're not an expertise in that area? and have those strategic conversations? Is it possible?

Kate Badgery-Parker 12:29

Look, I think it is possible and I've seen strategic communication committees or strategic marketing committees work quite well. I think it's just you need to be really careful. The request I would make is for board members to take a step back and reflect on what is going on in terms of marketing, and

why marketers need to be making the degree choices that have, I think, the example you started off with, well, I've got a Facebook page, so I'm a Facebook. I don't know You were being flippant when you were saying that the reality of the matter is, we have had this huge democratization of marketing. And through the rise of digital, anyone can learn to do it and short. The difficulty about that is what that's actually done is it's made marketing job harder, as well as easier, because it's much, much harder to get cut through in terms of marketing. And that means you've got to do things properly. And you've got to really think through you can't just send off a press release and get media coverage anymore. You can't just post on a Facebook page and get followers to concentration of money and ownership amounts Google and Facebook and others have made that they're actively changing their algorithms to make it harder and harder for you to get through without paid advertising. And what that means is I would like boards be asking those questions with a degree of sympathy and recognize that your job is to actually encourage the marketers and management in the organisation who are responsible for marketing to be more strategic and to set priorities, as opposed to creating work for them to do. That means it probably does mean think before you ask. But the questions I would encourage you to ask, are very much more about the strategy than they are about, oh, my friend does Twitter. Do you want to talk to them? Again, I don't mean that flippantly. I know there's some very excellent people sitting on marketing subcommittees. But there's also some people who haven't understood the change that is going on. And I think marketers have been most dramatically impacted by the changes in technology and we economy and they are at the absolute pressure point, particularly in smaller organisations. And the chances are your marketers are overwhelmed and overworked. And all you're doing is making your job harder.

Helga Svendsen 15:08

So what are some of the go to questions that you can suggest for board directors in dealing with these issues that will be helpful to the marketing staff rather than hindering? Have you got some go to question? Yeah,

Kate Badgery-Parker 15:23

I do. I think what I would be asking me, marketers or the management who are responsible is questions like, what are the marketing objectives that we are currently focusing on? What target markets are important to us? What gaps do they see? And what are they counting doing about those gaps? What problems are they trying to solve with the market? And probably also, what areas aren't we deliberately focusing on and marketers is a great we're struggling with this question around how do we stop doing everything. My ultimate coaching tip for marketers is recognise you can't do it all. And there's nothing wrong with you. You just can't. But I want board members to be thinking about that as well. How can you lift your marketing team and the senior people in your organisation up to a level to go? What choices have you made and why? The other thing I would also be talking about is, what do you need from us? fundraising is a really good example of this. If, for example, raising funds is something that is really important to your organisation, then there will be an approach the organisation has decided to take to fundraising, for example, are they primarily pursuing corporate sponsorship? Are they primarily pursuing funding trusts and philanthropic trusts and those kinds of

organisations is their focus on major donors As always don't individual donors. And if that's the case, then what assistance Can you give them? For example, if you have within your network strong context within an organisation that does provide corporate sponsorship, have a discussion with someone in that organisation about well, what are the criteria that you use? Can I tell you about this organisation and what they're doing and why their work is excellent. And then can I facilitate the discussion, I would be very cautious about the dumping run kind of approach, providing a contact to someone can actually just being a good example of making things harder, because of course, your marketing staff are going to want to treat that contest with a huge amount of respect because it came from a board member, but it may not be that that's the right thing. So the question really is, what are you doing that I could help with? That's a great question. What can we as a board provide to you, for example, If their fundraising strategy is to run large events, is there a way that you can help them through your network to provide? If it's major donors, can we introduce you to some magic? If there is something else? Again, I don't think that two way communication is the sort of thing that happened. I think boards have this view that we're going to ask questions to make sure you've done your due diligence. And when it comes to marketing, it's not impossible that they haven't thought of the idea that you're thinking about, but it is possible that they have, and there is some contextual reasons why that's not a good idea.

Helga Svendsen 18:39

That is a fabulous list of questions and issues for people to think about in dealing with their marketing teams. Okay, what about those small organisations that don't have a marketing team? What's the role of the board then?

Kate Badgery-Parker 18:56

It's an interesting problem because I look around at some of the boards that I know smaller organisations, and skill set isn't necessarily there to actually do the kind of strategic thinking that we're talking about. without pushing my own barrow. I do sometimes do those kinds of strategic reviews for boards, but there certainly are people on board who could do that work for themselves. But I think the role of the board then is to actually be saying, again, what is the task that is essential for us to complete? Don't just make a laundry list. What is the go back to the business's goals? What's holding us back in reaching those goals? And what are the essential things we need from marketing? Not just the nice to have comm idea?

Helga Svendsen 19:46

Again, fabulous advice for those organisations, whether they have a marketing team or not, I suspect Yes. Is there anything that we've missed so far in this?

Kate Badgery-Parker 19:57

You hear me saying that boards should wouldn't ask questions, you should. I just think that marketing is perhaps one of those areas where you need to be a little bit thoughtful about the questions that you ask and ask, am I making this harder or easier? But do ask questions. For example, I had a conversation recently with a colleague who had been asked to do a project for a research organisation. And it turned out that what they actually wanted her to do was write a marketing plan for a product. And when she started to talk to the management of the organisation, it actually turned out that such a plan already existed. Hmm. And the board wasn't aware of that plan. Now, I would have said that the board was very, very able to ask the organisation and perhaps they weren't asking questions to say, look, we've got this new product. Can you explain to us how you propose to take this product to market And what kind of KPIs and or accountability could be there? It's perfectly reasonable for you to ask for that. Yeah, what's not reasonable is for you to say, Oh, we should do an email and it needs to go out by this date. We should do this. You should do that.

Helga Svendsen 21:16

Yeah, what's already in place? And what do you need from me?

Kate Badgery-Parker 21:19

Yeah. And have those conversations. I think the other thing I would say, in smaller organisations, you will often have quite junior or inexperienced marketers working in the organisation, and their focus will be tactical. One of the things that a board can do in the same way CEO those organisations can do is make sure they are encouraging that person to think more strategically. In my work with marketing women, we run a small mentoring program for marketers, we will often get the junior soul marketer coming to us and what they are trying to do is too much and they become very easily overwhelmed and What the board and the organisation can be doing is going hang on now let's get back to the guts of what's essential. Not Is this a good idea? But is this something that will absolutely serve our current business?

Helga Svendsen 22:15

Ah, Kate, fabulous conversation today and plenty of pearls of wisdom in there for the take on board community. As we wrap it up, what are the main points that you want people to take away from the conversation we've had today?

Kate Badgery-Parker 22:28

The first one is to say, remember, when you're talking about marketing, unless you're a committee of management, it is no different to any other area of the board's responsibility where you're tasked with strategic approach. The second point I would make is to say take the time to understand what



the organisation's priorities in terms of marketing are, and what they're not. So for example, if I think about a ninja turtle brutally running PR campaigns, or securing corporate sponsorship are not on our priorities. Our relationships are with local councils. They're with research organisations, they're with others in our referral network, and they're with our families and communities. So it's very clear that corporate sponsorship, and PR is not right out there in terms of attacks. So that will be true your organisation. And, again, use that strategic lens that I'm talking about, why are we doing this? What's our priority? And how is the bit what's the best way to deliver this? As opposed to? Should we have a Facebook page or not? Or what information should be on the Facebook page that's not valuable? And the one I've already talked about, I think, is to think about and ask, what can you do to help And what does the organisation need from you as a board member? I reckon your marketing teams or senior managers would be quite surprised to hear that question.

Helga Svendsen 24:10

And is there a resource that you would like to share with the take on board community?

Kate Badgery-Parker 24:14

I saw this in your notes here, and I thought it was too great. But I wanted to take a little bit differently. As I said before, my approach is always one of thinking and knowledge. So the resource I wanted to suggest to people if you're in Victoria is the state library of Victoria or if you are in another state or city, look at the State Library of your city. They have once you remember the State Library, they have a number of online databases that you can use. So you may the sorts of things you might have been familiar with when you were a uni student or newspaper databases and things. So they're a great opportunity, particularly if you're a learning nerd like me to sometimes go a bit deeper than a Google search

Helga Svendsen 24:59

Libraries are magnificent - shout out to the libraries out there. In fact, Note to self, I'm going to try and find a board member of one of the libraries around to see if they can come on the show as well because libraries are just magnificent. Yes, such a great repository for information and great

Kate Badgery-Parker 25:15

Case study to have digital transformations Well, in terms of relevance and how to become and stay relevant.

Helga Svendsen 25:23

Fantastic. Thank you so much, Kate, for giving us your time and wisdom today. I know that the take on board community will find incredible value in this. So thank you for being with us here today.

Kate Badgery-Parker 25:35

My pleasure.