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A/E Rainmaker

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The Guide to Attracting and Keeping Great Clients

In This Issue

From Smart to Wise

By Ford Harding

When selling, professionals have an annoying habit of trying to show how smart they are. Instead of letting the client talk uninterrupted about his/her problem, the over-eager professional interjects ideas, anecdotes and other commentary designed to show off his/her intelligence. Instead of trying to look so smart, he/she would be better served by appearing wise.

Think about the words associated with "smart":

- Sharp — *Ouch!*
- Bright — *Light draws attention to the source (and away from the client).*
- Clever — *Too clever by half!*
- Quick — *Perhaps even quicker than the client.*

There is a competitive aspect to smartness not associated with wise and which is not appropriate. We see people compete on the basis of their smarts in school and on game shows. (The thought of a game show to see who is wisest is almost comical.) To show how smart they are, professionals, at the very least, compete with the client for air space.

It's not that brilliance is unwanted. As a client I certainly want smart professionals working on my matters, but I want them working for someone who is wise. I need smarts every day to get work done quickly and well, but at critical moments I need wisdom to make sure the right things get done. I don't want my business to end up like Enron; built with smarts and then brought down by lack of wisdom. I want to work with smart people, but I might be willing to bare my soul to a wise one. And that is the person I am most likely to hire.

Words associated with "wise" are reassuring in a tentative way. They show the traits we need to appear wise:

- *Not Self Interested*: A wise person gives me advice that is based on my needs rather than his/hers.
- *Prudent*: By being discreet and by avoiding undesirable consequences during the sale, he/she shows me what it would be like to work together. For example, he/she asks in preference to telling.
- *Patient*: Rainmakers listens patiently and attentively, so that when he/she does talk, just the right things are said.

From **rainmakers** and other senior professionals, clients expect wisdom, and rightly so!

Ford Harding is the author of *Creating Rainmakers: The Manager's Guide to Training Professionals to Attract New Clients,* which has just been reissued by John Wiley & Sons, and other books on selling professional service. This article is adapted from his blog, which can be accessed at www.HardingCo.com/blog/. He can be reached at 973-763-9284 or by e-mail at fharding@HardingCo.com.

From Smart to Wise:

This special issue of ***A/E Rainmaker*** was created out of the collaborative efforts of SMPS and PSMJ Resources, Inc. PSMJ is proud to sponsor the SMPS/PSMA *Marketing Communications Awards* and the 2007 SMPS/PSMA National Conference, **Build Business: Politics at Work** in Washington, DC.

Benefits of the MCA Program to Our Peers

By Kim Niedzielski, SMPS

Great marketing communication pieces deserve recognition! The Marketing Communications Award (MCA) program is one of SMPS' premier events, recognizing excellence in marketing communications by professional services firms in the architecture/engineering/construction industries.

Whether you are a juror or entrant, the MCA program provides valuable benefits to you and your firm. As the only marketing-awards program serving the A/E/C industries, the program encourages you to share your expertise with peers on how to create successful communication pieces. In addition, the MCA grants you well-deserved boasting rights by providing a national showcase for your creative, award-winning communication pieces.

This year's awards program was one of our most successful. Approximately 195 member firms submitted over 350 entries from the U.S. and Canada in 18 categories. Seventy-seven jurors from across the country gathered at HGA's Minneapolis offices on Saturday, April 28th to evaluate the high-quality submittals.

While spending a sunny spring day poring through entries may seem daunting, the MCA jurors, in fact, found the day fruitful — and yes — fun. The event provided jurors prime opportunities to critique other firms' work, gather ideas for their own firm, share insight and thoughts, and — best of all — network with professional marketing peers from across the A/E/C industries.

For SMPS members, the program is a great opportunity to increase your professional awareness, such as:

- Want to discover marketing trends from across the profession?
- Gain insight into stimulating, cutting-edge design?
- Did your competition push the envelope to increase market share?

Enter the MCA to find out. All entrants and jurors receive a "trends summary" that can inform your next marketing campaign. This is a terrific tool to evaluate how you match the competition.

Yet strong marketing communications is more than just glossy brochures. Strong marketing communications are essential to a firm's growth and prosperity. By including ROI as one of the judging criteria, the awards program validates that creative marketing builds business and increases firm revenue. This is the value you bring to your firm as a marketing professional.

To promote good marketing, the awards live beyond judging day. The winners receive an engraved crystal. In addition, winning entries will be listed on the SMPS web site, published in the SMPS *Marketer*, and displayed in the exhibit hall at the annual conference, *Build Business: Politics at Work* August 22–25 in Washington, DC and at various SMPS and industry events around the country throughout the year.

I hope you think about your best communication pieces to submit next year. That's what I did after reviewing the 2006 winning entries. And remember, if your piece didn't win this year, you should resubmit next year. Different jurors bring different perspectives each year. Your piece could be a winner!

Kim Niedzielski is a senior marketing manager at HGA Architects and Engineers in Minneapolis. She was the chair of the 2007 SMPS Marketing Communications Awards program. She can be reached at: kniedzielski@hga.com or 612.758.4324.

Being Great

By Dennis M. Schrag

In our own way, we each aspire to be great. Marketing and sales professionals and executive leaders tend to thrive on competitive pressures. They seek greatness in some form. How do you become great?

Greatness is a "relative" quality. One of my favorite radio stations plays rock and roll's "greatest" hits. But there are recordings of Baltic Folk Songs Greatest Hits, too. Being great is relative to the sandbox you are playing in.

Mighty by Sacrifice.
Rudyard Kipling said that great people are "humble because of knowledge; mighty by sacrifice."

That quote connects with recent research in the area of personal greatness. The researchers are British based Michael J. Howe, Jane W. Davison and John A. Sluboda. In an article in *Fortune on Line/CNN Money* called "What it Takes to be Great" (October 19, 2006) the concept of natural talent that leads to greatness is discussed.

Research indicates that targeted natural gifts don't exist. People are not born to be CEOs, superlative sellers or exceptional marketers. People achieve greatness through an enormous amount of — drum roll please — hard work over many years.

Look at Warren Buffett, one of the greatest investors in the world? Ask him. He will tell you he is very, very disciplined and spends a massive amount of time studying financial statements. He also surrounds himself with a few others who have the same — longevity in the field, passion, and dedication. They coach each other.

Common Elements of Greatness.
People don't learn much by making the same mistakes over and over. K. Anders Ericsson of Florida State University says that great people in any field have some common factors:

Hard work — there is no evidence that higher performance comes without experience. Researchers say it takes at least 10 years intensive experience to be great in a discipline.

Practice — but the experience has to include "deliberate practice." Deliberate practice means the expert has ever increasing goals. They seek critical analysis on what they do and how they do it. They use coaches and seek feedback. Tiger Woods has reinvented parts of his game several times. Each time he changed his win record dropped. However as he practiced and internalized the coaching feedback on the changes, he progressed to greatness.

The Great Practice Deliberately.
Winston Churchill, one of the world great orators — practiced intensely before each speech.

Michael Jordon is known for the hours of additional practice he provided over and above his team's grueling practice schedule. (He was cut out of his high school team).

Tiger Woods started playing golf at age 18 months. By the time he won the US Amateur Open at age 18, he had over 15 years of guided exercise and preparation.

Want to be great?

- ♦ Work at it.
- ♦ Set tough goals for yourself.
- ♦ Examine what you do and how you do it.
- ♦ Get a coach who will provide expert feedback and encouragement.
- ♦ Instead of just trying to "get it done" you must want to "get it done better."

Adopt this mindset. And then rehearse. As is so much of life, execution is critical. Nike is right — do it.

How do you get to Carnegie Hall? Practice. Practice. Practice.

Dennis Schrag, Ed.D, CPSM is the President of The Longview Group, a national firm headquartered in Iowa City, IA. He is on the faculty of the University of Iowa, Tippie College of Business. He was corporate marketing manager of The Stanley Group, a 700-person E/A/C and environmental firm. Contact him at dennis@longview-group.com, or at 866-351-6510.

Market Research: The "Pick and Shovel" of Business Development

By Rich Friedman

A/E/C and environmental consulting firms often grapple with the value of conducting market research and how best to maximize their return-on-investment (ROI) from research initiatives. I'm a huge believer in its value — as long as the research is focused and timely, and the findings are fed back to the appropriate management processes to drive real change. Depending on research methodology and the questions used, the data gathered can impact a number of key operational areas of a firm's "management dashboard," including project delivery, marketing and business development, IT, and finance and accounting.

In addition, conducting market research:

Strengthens your relationship with clients, prospects, and influencers. We all know that people are flattered when asked for their opinion or experience on a particular topic. The process of gathering data from your target audience, and then shaping your services and/or project delivery to reflect your findings, sends a powerful message of progressiveness and continuous improvement.

Enables your firm to focus its business development resources and efforts. Mehmet Turkel, Director of Marketing and Business Development for **Applied Technology & Management** (Gainesville, FL), a 150-person coastal, environmental, marine, and water resources engineering firm, refers to market research as the "pick and shovel" of business development. He adds, "A thorough research of your target markets, companies in that sector, and key players in each firm is key in developing a successful business development strategy. It helps you focus, and when we focus, we win most of the time."

Provides invaluable data points for your firm's planning processes. Strategic and marketing/business development planning are too often conducted in a vacuum — void of internal data points from employee surveys and external data from those who make or influence the decision to hire and refer your firm.

Provides an edge in pursuing competitive work. The more intelligence your firm can gather early in the business development process (e.g., in the case of public clients, before they are compelled to communicate to all pursuers), the greater advantage your firm has in crafting a hard-hitting proposal and presentation that has laser focus on the client's needs and how they'll measure success.

Enhances skills vital in the business development process. Honing one's ability to ask probing, intelligent, open-ended questions is a life-long process, as is active listening — another vital component of the business development equation.

Haley & Aldrich (Boston, MA), a 500-person geotechnical and environmental consulting firm, embraces the value of market research so much that it has adopted the mantra, *Serving Clients Through Inquiry*. "Market research helps us learn about our clients' ecosystem — not only where we might fit in, but understanding where the client fits into that ecosystem," adds Denise Coleman, Vice President of Marketing. "This leads to greater efficiencies in the business development process and a greater recognition of our value. It's a much different approach than simply going to the client and selling them the services we have." Haley & Aldrich has used market research to:

- Help formulate entry strategies into new markets
- Expand service offerings to meet clients' needs
- Identify industry trends and changes in the decision-making process that may impact the demand for the firm's services
- Drive direct mail and web site content generation

In addition, the firm has conducted numerous focus groups and one-on-one client feedback interviews. "The focus of the interviews has shifted from the client's experience with Haley & Aldrich to the client's overall experience what they're seeing, what's impacting them, how they're operating differently, and what they see on the horizon," adds Coleman.

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Market Research: The "Pick and Shovel" of Business Development (cont.)

Maximizing your ROI

The decision to conduct market research, as well as research targets and tools, is very much a strategic one. Maximizing your ROI requires careful thought and planning — involving firm leaders and senior marketing/business development staff. Keep in mind that:

- Your firm's strategic plan (including mission and vision) should drive the research, not vice versa. In contrast, the research may very well drive your marketing/business development plan.
- Your research initiative must be focused and concise.
- The research initiative should not be overtly self-serving.

Haley & Aldrich's Coleman goes further: "Your research efforts should add value to the client — they must get something for the time that they invest." Haley & Aldrich often shares findings (without attribution) to all participants to generate goodwill and to serve as a clearinghouse of valuable information.

Rich Friedman is President of Friedman & Partners, a marketing and management consultancy that helps A/E/C and environmental consulting firms achieve and sustain growth. (www.friedmanpartners.com). Rich will be presenting a workshop entitled, "Achieving & Sustaining Firm Growth: the A/E/C Industry's Premier Tightrope Act" at SMPS' 2007 Annual Conference in Washington, D.C. You can reach Rich directly at (508) 276-1101 or rich@friedmanpartners.com.

Networking: How To Maximize Your Conference Experience

By Karen Susman©

1. Play the host. Pretend you're throwing this gigantic party and you want everyone to feel welcome. Introduce yourself. Introduce others. Ask open-ended questions. Listen. Spin your mental Rolodex to see how you can help your "guests."
2. Meet at least one new person in each session, at each break and at every meal.
3. Get more business cards than you give. Then you can follow up.
4. When you attend a session, introduce yourself to the people around. Find out why they picked this session, what other sessions they suggest, etc.
5. When you ask questions or offer comments in a session, say your name and company first. Be visible.
6. Spread your resources. Don't roam the conference or trade show or sit with people you know.
7. Use the buffet as a networking venue, not as a trough.
8. Set appointments with vendors instead of visiting endlessly at booths.
9. Organize and toss materials at the end of each day. Start an action/idea list. Turn good intentions into reality.
10. Follow-up immediately. Send an e-mail from your room the same day you meet someone. Buy postcards in the gift shop and send brief notes.
11. Send scenic postcards to clients and contacts stating you've learned many new things that can help them.
12. Create an event. Invite disparate attendees to join you for dinner.
13. Leverage your experience. Share your new knowledge with your firm. Provide an executive summary. Write articles for trade journals or your company web site or newsletter.
14. Plan for next year. Plan to speak or introduce a speaker. Appear on a panel. Volunteer as a greeter. Set up appointments in advance. Sponsor an award or contest.
15. Follow-up or forget it. E-mail Karen@karensusman.com for carloads of follow-up ideas.

Networking at a conference and trade show, if you do it right, is hard work. Wear comfortable shoes, carry deodorant and breath mints. Get out there. A conference is a terrible thing to waste.

Karen Susman is a networking expert. Visit www.karensusman.com for free articles and tips. Her guidebook, *102 Top Dog Networking Secrets*, is just $5.

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Hiring Sales People who Actually Sell

By Brandon Gutman

Recruiting during the existing talent drought is challenging enough, but finding effective salespeople is especially difficult. Our executive search firm has to constantly deliver A+ sales candidate to its clients. Here are some of the rules we follow that you can also use to uncover the real deal.

Avoid job hoppers.

Be careful of candidates who don't demonstrate staying power. For example, our recruiters will frequently forgive candidates if they have had multiple jobs in a short period; however, they look at where that candidate has been the longest and believe that is the most amount of employment tenure they would be capable of giving to their next employer. We must be tolerant of job changes related to the bubble bursting, 9/11, et. al., but be wary of talent that can't commit beyond extenuating circumstances. Remember that past experience dictates future results.

Interviews are windows to sales calls.

Most sales gurus agree that listening is the most important skill for a salesperson. Successful salespeople try to talk as little as possible on a sales call...the same is true during an interview. Watch out for candidates who talk too much as this is usually an accurate indicator of how they perform on a business development call. An effective salesperson asks great questions and wants to keep the other person talking as much as possible.

Separating hunters from farmers.

Asking the right questions can help reveal a true hunter. If the candidate's resume claims they were responsible for specific client wins or revenue figures, have them illustrate the exact role they played. They should be able to explain how they engage prospects, approach cold calls and develop new opportunities. Try questions like "how do you generate leads?" ..."why do people buy from you?"... "what's your secret power in sales?"

Request proper references.

Candidates tend to have a prepared list of people who will most likely say only fabulous things about them. You can call them but request additional contacts. Our recruiters like to speak with a former manager, an active client and an inactive client. Probe the former manager on how the person was managed, how they grew in the position and increased the business. Ask the clients "if, given the appropriate opportunity, would you buy from the candidate again?"

Before pulling the trigger.

Talk with the candidate about your short and long term vision for the business. Discuss verticals that need to be opened/ leveraged and clarify revenue targets. Have the candidate put together their proposal for accomplishing these goals. This plan should indicate what's to be expected in the first thirty, sixty and ninety days. By having your candidate do this bit of homework, you'll know if they're truly passionate about the opportunity and have what it takes to be a sales superstar.

If you would like additional tips on hiring stellar sales talent or need advice on a senior level search, please feel free to email Brandon Gutman, Director of Marketing & Business Development, Stephen-Bradford Search, New York, NY, brandong@stephenbradford.com or call 646-728-2319 (direct).

Don't Let Your Planning Process Lose You Work!

By Michelle Fitzpatrick, CPSM

Let's assume that your firm develops annual business and marketing plans for all of your operating units (we certainly hope this is the case). Most firms' annual planning cycle is synched with their fiscal year — which usually begins sometime in the fall — or the calendar year.

Particularly if your firm does public work, the timing of your planning process may be losing you work. If you do your plans in the summer or fall, public agencies as well as private clients will be well into the selection process for the year's slate of capital projects before your plans to market them are even drafted!

Most local and state public agencies' fiscal years begin in July. The Federal fiscal year starts October 1. The annual

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Don't Let Your Planning Process Lose You Work!(cont.)

capital plans as well as longer-term Capital Improvement Programs (CIPs) for most agencies are in draft form at least six months before the start of their fiscal years and are often available for review. Corporations also start developing their capital budgets and long-term capital plans at least six months if not a year before their fiscal year begins. They may not be able to send you a CIP, but your corporate client contacts will know what's being planned.

So, "reset" your planning clock. If your firm's strategic plan is moldy, schedule a redo for this summer or fall and then start researching client trends and opportunities for your annual plans before the end of 2007. Even if portions of the plans, such as the budgets, are still in flux, you should have the proactive portion of your marketing plans finished and underway by no later than mid-March of 2008 so that your firm can catch the first waves of new work next year and to have the time to effectively market major projects that will be coming up in your clients later capital budgets.

Michelle Fitzpatrick, CPSM, is Principal of Marketivity, Inc., with 26 years of A/E/C marketing and management experience. Prior to starting the firm in 1988, she was VP for Corp. Dev. and Marketing at an ENR 'Top 100' E/A/P firm. Assoc. Principal, Katy Potts, has over 30 years experience. Contact them at 1.888.325.5885, visit www.marketivity.com, or e-mail michelle@marketivity.com or katy@marketivity.com.

Teamwork = Client Satisfaction = Loyalty

By Richard Einhorn and Dr. Timothy Crader

Many consider client satisfaction to be a proxy for a firm's success, and much attention has been directed toward ways to improve it. As a result, many firms are turning to servicing their clients with specialty teams. Teams that focus only on client needs will have a much greater range of perspectives and skill sets. They will also have far more information to generate new and creative ways to solve client problems. Teams that can bring alternative solutions that also fall within standard practices to clients will be much better equipped to meet or exceed those needs.

Another key ingredient that a cross-functional team brings is a varying perspective on how to solve difficult client issues. The benefit of using cross-functional teams is that it minimizes the isolation and narrow perspective that are by-products of departmentalization and specialization. At the same time, it preserves and reinforces the expertise of various specialist areas.

Research has indicated that several other outcomes are derived from delivering client satisfaction. One key outcome is loyalty. Most firm leaders' measure loyalty through the degree of retention of existing clients; if a client is satisfied with a firm's performance, loyalty will increase, and spending will be greater and extend over a longer period.

Research has also shown that a loyal client is less price sensitive and pays less attention to competing firms. The reoccurring revenue stream built by long-term relationships allows firms to forecast capital and operating expenditures better. Clearly, this characteristic can affect the firm's net income. However, not all clients remain loyal, and the cost of attaining new ones is steep. Recent studies have uncovered the six main reasons clients defect. They are: price, product, service, market, technological, and organizational causes.

A phenomenon called the *loyalty ripple effect,* investigates and determines how clients spend when they feel a high level of loyalty. The ripple effect for service firms is based on three key concepts; value of a client, word-of-mouth communications, and service loyalty.

Previously, the measure of the value of a client had been focused on the one-time revenue stream generated by a satisfied client. However, a shift has transpired, and it's now based on the lifetime value of the client and not just the short-term revenue. It becomes "transformational" rather than "transactional" as the result of achieving ongoing client satisfaction.

Rick Einhorn is CMO for EYP Mission Critical Facilites, a 350-person global firm with 11 offices across the US and Europe.
Tim Crader is VP of Sales of EYP Mission Critical Facilites.

MARKETING IN A FLAT WORLD Part 1

by Jack Jolls

Marketing? …That would be Professional Services Marketing ...in a *Flat World.* And of course, by Flat World, I refer to the recent work of Tom Friedman of the *New York Times*.*

Did you ever wake up in a cold sweat in the middle of the night wondering if the dream you just had was real. You feel yourself falling and falling and falling and just before you hit the bottom of the elevator shaft… **YOU WAKE UP!!**

The marketing department has been downsized. (The CEO says," Right sized.") The board decided to consolidate a lot of the more automated processes the firm has in lower cost work centers. You see, he says, "Our public sector clients will abandon us if we raise our hourly rates. And when they find out what our multiplier really is, there will be an explosion of righteous indignation about how those engineers (or architects) are overpaid." (What the boss really said, "We're out-sourcing some of the more mundane stuff. That guy named Desai, who speaks English the way they do in Indianapolis, whom you met last week, is our new manager in Bangalore.") If you never heard of Bangalore, you'd better open *Google* right away and start typing B…A…N.. Etc. By the way it's in India. It's described as something like the Silicon Valley of that country. Information technology (IT) is big business in Bangalore. Intel, Microsoft, Cisco… they're all there and so are thousands of entrepreneurs looking for new business. The entrepreneurs are really excited because they can now go to the U.S. say for three years, and then come home and keep their old job. (The one they had in the U.S.) You see, they live in the Flat World. In the Flat World ***EVERYTHING IS CONNECTED***.

Here's some commentary about the capabilities of a design firm.

*"Architectural and engineering firms, design consultants, architects, real estate firms and property developers have discovered the **value of .....** – to provide added value to their customers through **specialized architectural design services**, technical expertise and high standards of quality, reduced costs and quicker turnaround on projects."*

"At …   , we become an extended arm of your business. We assist you with the architectural design, presentation and workflow of your architectural engineering projects, with services that address your specific needs. Whether it is for commercial, industrial or residential property, we understand the importance of landscape and interior design and their contribution to the success of your project."

That should be pretty familiar language. It could easily be language about that generic American firm in Indianapolis. It's not. It is the web-based marketing brochure text for a firm in India and not Indianapolis that wants you to outsource your A/E work to them. And, oh by the way, for about 1/3 the hourly rate. And also, oh by the way, don't be surprised if they have marketing people on the ground in the U.S. doing business development. Those marketing people will also have impeccable communications skills. Some you may recognize as former colleagues.

Here's my point. When the resource looks and feels like the one you're used to and comfortable with, but it's not, it is time to re-examine position in the marketplace. This should be a continual process; but…it's not.

I think that any firm that is committed to the concept could send its entire proposal writing, marketing communications, and graphic design capability off-shore. It's even more true if the off-shore folks spent a few years say, back here in Indianapolis learning the lingo, the context, the science and technology, **and building personal relationships.** After all, it is about relationships, isn't it?

Jack Jolls is the managing principal of John D. Jolls and Company, a management-consulting firm in Storrs, CT serving the A/E/C industry, with ethics training, leadership development, strategic planning, and developing healthy conflict skills. He can be found at jjolls@aol.com or 800-338-0069. Jack is a past president of both SMPS-Boston and ACEC/CT.

**Friedman, T.L., "The World is Flat: A Brief History of the 21st Century," Revised Edition, Farrer, Strauss, and Giroux, 2006*

Got Training?

By Joanne Linowes

In-house professional development programs are grabbing attention in firms of every size. Partially fueled by need for CEUs, better skilled staff, and as enticement for attracting and retaining employees, they are referred to as training centers or in-house universities or lunch-and-learn, or retreats, or breakfast seminars, or whatever.

In-house training is good company policy, vital for employee growth, and unfortunately is falling into dull routines. My work within firms nationwide leads me to observe ***The Three Big Nots*** for Stronger In-house Professional Development Programs.

1. Training Does Not Market Itself. If you offer it, will they come? Just because your program has great offerings, does not mean that people will take the time and energy to sign up and attend! And, if staff is directed to take certain courses by their supervisor or HR, that does not ensure they will participate with the requisite level of interest and commitment.

When you have excellent courses and seminars delivered by recognized experts from both within and outside the firm, *get your marketing machine in gear!* Take some graphics time and skill to make the offerings catalogue and flyers (on line or hard copy) look "exciting." Prepare motivational and enthusiastic course descriptions. Use promotional language and explanations that articulate value-added aspects of each course. When you give the information, descriptions, and registrations process a little flair, the "buzz" reverberates throughout the firm. Grab a marketing moment internally — enhance the entire training effort; ignite interest several times a year.

2. More is Not Better. The most common area for strengthening in-house training programs is to acknowledge that more courses do not necessarily equate to a better program. Offering too much all the time simply dilutes the perceived value of the courses, reducing registrations/enrollments, and diminishing level of commitment on the part of participants.

While it is important to offer a wide range of topics that reflect the breadth-and-depth of your firm's activities and services, the more effective training programs limit the number and courses available within a specific timeframe. If you have, say, 50 possible topics from technical to management to administrative, offer only a small percentage each quarter. Each topic appears to be given special attention. The fewer you offer, the more important each is perceived to be, the more precise can be the outcomes, the more targeted the follow-up.

3. In-house Experts May Not Be Great Classroom Instructors. No offense, but . . .yes, it is important to have as instructors your principals and in-house experts in management, IT, HR, technical, scientific, design, and construction disciplines. They have the content, experience, and savvy that needs to be shared with others in your firm.

BUT, that does not make them great at presenting their ideas effectively, cultivating a dynamic learning environment, or developing an engaging learning experience. A needed topic becomes a deadly seminar if the person serving as instructor is ineffective, dry, or unaware of how to turn expertise into an educational session. PowerPoint does not magically turn a person into a good presenter. Knowing how to do something does not guarantee the information can be taught in a way that builds skills in someone else. If the instruction is not effective, the course or seminar is not maximizing time, dollars, or motivated energy.

You will find it is very valuable to bring in an outside training consultant to conduct train-the-trainer sessions to provide guidance and techniques vital to helping in-house experts become educators.

Great training programs produce a well-skilled and motivated workforce within your firm. Un-do the three ***nots*** so your firm will provide the highest caliber professional development program!

Linowes Executive Development International (LXDi), is nationally recognized for coaching winning presentations and providing in-house training in communications, train-the-trainer, and marketing skills for design and construction firms since 1986. Contact: jlinowes@lxdi.com www.lxdi.com 508-359-1011.

Referral Marketing

by Stephen Hom, PE, FASCE

Statistics tell us that referral marketing is four times more effective than cold calling, yet many companies do not have a strategy promoting referral marketing. When you know someone in common, your call becomes "warm." Think about this: When you are ready to buy a service or product, do you prefer looking in the yellow pages, or receiving a referral from a friend or someone you trust? Why? Because you prefer not to buy "cold."

Here are some important points to learn to be effective at referral marketing:

♦ **Learn to network.** One of the keys to building your business from referrals is forming relationships of mutual support. Your network should include your clients; prospects; people who can give you referrals; people who can give you advice, wisdom, and access to their network; people who work for companies that you'd like to prospect; and people representing interesting services or products who can be of benefit to your contacts.

♦ **Learn to develop relationships.** Enter relationships with an attitude of service and with the mind set that "the relationship is everything." If you help others without asking for something in return, they will eventually help you. So when you meet a prospect, look for ways to help or serve them.

♦ **Do a great job for your clients.** Understand what they expect and exceed their expectations. Find ways to help them do a better job and make life easier for them. Take a genuine interest to learn about their interests, pressures, and other projects they are working on. Get to know their company and help them get to know you and your company. It is important to maintain and advance your own technical expertise and keep abreast of new developments. It would then be much easier for them to give you additional work or refer you to others.

Finally, be sure to get client feedback. Statistics show that most unhappy clients don't like to complain, they just take their business elsewhere. If you don't get feedback, you won't know whether they are happy with your service or not.

♦ **Learn to get referrals.** The best time to ask for referrals is when your client has expressed satisfaction or appreciation for your service. The quality of the referral can vary from a "cold" to "hot." You can upgrade or warm up the referral by having your referral source call his referral first, or better yet, have your source introduce you directly with a face-to-face meeting.

Understanding a few basic fundamentals and with some practice, you too can be very effective at referral marketing. Remember that the best prospect is a satisfied client, the second best is a referral from a client, and the third best is a referral from a common contact. You are in the people relationship business and learn to give before getting.

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Internal Support System Key to BD Plan

by Gina A. Bedoya, CPSM

Too often I have witnessed firms with great business developers who know how to perform the market research, network and sell, but often lack the organized internal marketing support system needed for the follow up. There are 5 key issues that I have found to be essential in creating and managing your internal marketing support system:

1) Work from the Marketing Plan. The marketing plan, which includes a budget, is the 'road map' for achieving the marketing goals and where your strategies will support your Business Development Plan. Clearly identify the steps and tasks that are expected from your marketing effort and you will be off to an excellent start.

2) Establish Communication Procedures. Reporting and sharing information is crucial. Inform all pertinent people on appropriate matters; make sure meetings have a set focus, and distribute standard marketing reports on a regular basis. The reports should be short and concise, not in-depth and detailed. Give just enough information to convey the big picture.

(cont. next page)

Support System (cont.)

3) Set up Internal Marketing Systems. Internal marketing systems, essential to the execution of your marketing effort, includes databases, collateral materials and tracking systems. Establish these systems early on and update on a regular basis.

4) Provide Necessary Support Staff and Tools. Whether it is an administrative person or a skilled experienced business development person, your support staff should be valued and given the proper tools to perform their duties. Make sure to involve and inform these individuals in the strategic goals of the firm so these individuals grow to become catalysts for the overall success of your firm's marketing efforts.

5) Get Buy-in from Firm Owners. Firm owners have to be cognizant and in agreement with having a concrete marketing support system for their sales effort. Owners must approve the marketing plan and budget, thus giving the go ahead to developing and implementing a support system. The buy-in from firm owners is crucial.

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Teamwork

by Bernie Siben

We talk a lot about teamwork – but the discussion is usually about what happens once we get on a team. The hard part for a firm seeking subconsultant roles is to make itself attractive as a potential team member.

This involves the quality of the firm's work, and the prime firm's perception of that quality. It also involves the attitude governing how one firm's staff works with another firm's project manager.

But qualities about a firm's participation in the proposal process can strongly impact whether or not they will be invited to be on a team in the first place.

A subconsultant can position itself with favorite primes by ensuring that it's marketing materials always:

1. Are in the requested software
2. Are in the correct format (especially if the prime provides a template)
3. Are ready to use (appropriately tailored, correctly spelled and punctuated)
4. Include appropriate, high-quality images
5. Are delivered on or before the date requested by the prime

In addition, if the subconsultant has special relationships with the owner, or special capabilities relevant to the project, both increase the firm's attractiveness to the prime.

Finally, the prime will always appreciate the subconsultant's offer to draft technical sections related to their own services. This is particularly true where the prime does not have these capabilities in-house. The offer to draft a section before being asked is the mark of a team player.

The marketing challenge is to know what you bring to the table, how to produce the required information within a very rushed schedule, and how to best leverage your information and personal assets to increase the team's probability of success.

When a prime knows your firm does high-quality work, and that your marketing staff will deliver good information, ready to use, in a timely manner, you will receive more invitations to team on the kinds of projects you want in your portfolio.

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Givers & Takers - A Recruitment Tool

By Judy Kienle

Ever wonder why the same people in your organization take on new challenges while others sit back and coast? Those same people are usually the first ones to organize a volunteer effort when a company or community tragedy occurs — it's their operational style and knowing this can be an advantage in recruiting and retaining the right employees.

Companies use personality assessments to measure a future employee's fit within an organization. But what if you used an initial screening instrument that doesn't cost anything and gives you enough information to proceed? Consider using a test that could yield results by dividing people into two basic groups, givers and takers — providing an early warning system that gives you some basic indicators of an applicant's orientation to life.

Signs of a Giver.

♦ The person who is first to arrange a gathering to build relationships at work.

♦ The manager who arranges incentives to reward extra effort or is flexible in dealing with personal issues.

♦ The employee who takes on extra assignments or helps out in a crunch without being asked.

♦ The manager who takes time to recognize and thank other staff for helping out during busy times or in a crisis.

Signs of a Taker.

♦ This employee wants to find a way to wheedle all the extra time off possible, comes in late and leaves early.

♦ This person expects to be making a huge salary within a short time, because that's what they feel entitled to.

♦ The manager who gets people outside his or her reporting structure to do extra work by manipulating people.

♦ The project manager who disrespects other employees by not providing timely information on assignments.

Takers are marginal employees who weigh down your organization, destroy morale, and eat into your profits and productivity. But what if you could circumvent this process by using a tailored screening tool—based on situations you create from your own experience in your organization—to weed out the deadwood before the infestation begins?

A Recruitment Screening Test. Take a fresh approach, do something different. Devise your own test. It may be as simple as creating some scenarios for the applicant to respond to. Explain to the prospective employee that these are open-ended questions and ask him or her to tell you what they would do in each case.

Here's one example: The applicant comes to work one day and realizes the flu epidemic has hit hard and many of the support personnel such as receptionist and administrative assistants are out sick. Who will answer the department's phone? Order lunches for the client meeting that day? Who will take on the extra work gathering information for the proposal that's due in two days? Who will call the IT department when the system crashes in the middle of preparing an executive report that's due that day?

In this example, a giver will be the one to pitch in or become part of the solution, and the taker will be the one to defer the work to someone else, complain about the situation, or looks to place blame. The answers are yours to interpret and make decisions about the best fit for your organization. Involve the department you are recruiting for and ask them to help create examples by submitting real work examples. There are many excellent personality assessment options and they need to remain a part of your recruitment program, although they can be supplemented with customized instruments you develop, like this basic screening test that is custom made for your corporate culture.

Call me a maverick, but I think simple is good and this approach can provide you with enough feedback to see who you are inviting to join your corporate family. Either way, givers or takers, you decide. Just be prepared for the consequences.

Judy Kienle, CPSM, MPH is Principal, Kienle Communications, Ltd. and Partner, The Marketing Collective, Strategies for Marketing Professional Services,Cary, NC. www.themarketingcollective.com. She can be reached at 919-463-5613 and jkienle@nc.rr.com.

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- ☐ **Examine** if it's responsive to your client's needs.
- ☐ **Conduct interviews** / Internal: those who use it.
- ☐ **Conduct surveys** / external: those who receive it.
- ☐ **Ask:** what kind of image do we want?
- ☐ **Define** objectives outlined in the strategic, business and marketing plans.
- ☐ **Evaluate** other firm's and competitor's promotional material.
- ☐ **Determine** the message for each market segment.
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