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10 Midland Avenue  
Newton, MA 02458 USA

# A/E Rainmaker

## The Guide to Attracting and Keeping Great Clients

### SEEK OUT THE CLIENT'S REPRESENTATIVE

You've all heard the following marketing advice given by consultants, I'm sure. Help the client write the RFP; read between the lines of the RFP; know the makeup of the selection committee; know the client's hidden agenda; play to the client's "hot buttons." But rarely do we find out how to accomplish these tasks, how to conduct such research, who to ask, and the right questions to ask.

Alan Rubacha is a consultant who works with clients as an owner's representative. He helps set up selection committees. He prepares the questions you are asked. He helps the client develop their program, and he is part of the entire process, eventually becoming part of the client's project management team. You should get to know him very well, and the earlier the better. Alan told us some of the behind the scenes activities that he engages in to see that the client's interests are best served, as well as how consultants should view the selection process from the owner's perspective.

Alan pointed out how the owner's team is developed. It starts with the key person taking notes, organizing the people, even if that person is not the decision maker on that committee. For the project chair, they identify somebody strong who could be a tie-breaker; perhaps an operations person. He gets the team together and explains their commitment to put in the extraordinary amount of time required. Then he outlines the process of selection.

"It's like a little government," Alan said, "we have to decide exactly how we're going to review the firms' qualifications. We also have to factor in regulatory reviews, because we know there are bodies outside the committee that impact on our decisions."

Alan pointed out that the owner's team development is very experiential, very personal. "At a university it's important that you have a cross-section of the community you'll be dealing with. Generally there is a senior administrative person, a senior faculty member, typically a dean of the department you'll be working with. There are also users from that group, a university relations person, a fund-raising person, an operations person, and that's how the committee is developed. You can image a slice through the community and whatever specific type of building it is, you'll have more input from that segment."

Alan advises firms to consider taking a holistic master plan approach – think about utilities, parking, traffic, the environment. Understand it early and you'll be able to account for it. Understand it late, and you'll be going back to the beginning. Determine how to involve the broader community. More than that, "it's knowing our goals," Alan added, "and what an architect can do to help an owner that doesn't have it all together, is help develop the game plan, the strategy, the long-term goal.

(cont. on next page)

## SEEK OUT THE CLIENT'S REPRESENTATIVE (CONT.)

An architect should take a step back and say to an owner, 'let's think a little bit longer term. If you don't have a master plan, maybe we can spend a week just helping you develop some of your ideas.' Then the owner can approach a community with a broader sense of larger goals," Alan said, "instead of just focusing on one project, show them all future projects and challenges at once. People and regulatory officials respect that and will give you a lot more leeway."

Alan sets up a single point of contact to make the process go smoothly for document flow, and communication flow. This is the person you want to talk with. They often hire a feasibility study before they try to secure architectural services. This is when you should be talking to Alan. "It's never too early to define the project delivery method either," Alan added, "it determines how you will interface with all the other teams." They also talk to specialty consultants before the A/E selection, to have as much information as possible before developing an RFQ. Finding out who these specialists are can be another source of valuable information.

Their basic selection process takes 12-30 weeks. First they identify 20-30 firms, visit their offices, find out who did what, and ask what the owners think of their work. "We want to put as much into the RFQ as pos-

sible; to tell the architect a story - description, history, our selection process, scope of work. Here's what we want, here's the way we want it."

"We also have to ask the right questions if we want to know very specific things," Alan said, "and here's an example: What initial steps will your firm take to capture the university's character and culture in a structure that must be located on a specific site?" The answer to that question alone actually prompted the hiring of the last three firms. "Some firms gave a one-page response. Others went into great detail about the things they looked at to help that building become an integral part of the campus," Alan confided, "and that played an important role in our scoring process."

A matrix is then developed based on the list of questions, weighted with a score, so the committee can review all the responses on this matrix in a ranked order. They then use the Delphi method to help make final decisions. The Delphi method – after the most revered oracle in ancient Greece – is actually just the opposite of a tool for esoteric predictions. Developed in part in 1946 by the RAND Corporation and later refined, it makes "the best use of a collection of less than perfect information." (<http://www.iit.edu/~it/Delphi.html>). It's a method based on a structured series of

questionnaires geared to get controlled feedback. "It takes the committee process and makes it objective instead of subjective," Alan pointed out, "committees generally fail when you have one overpowering member pushing for a favorite selection. It helps form good judgment. It's trackable, recordable, and it helps the group feel confident that they are making the right decision. With the matrix and Delphi method, selection becomes more objective, and provides the basis for discussion of the team members' attributes."

At the interview, presentation is everything. "We need to pick the person or firm that we're going to work with for five or more years. We put the information out there about the committee, so play to their likes and avoid their dislikes. If you're not prepared you're not going to win. Coach your team to the point that they are all on the same page. We want the team who will help us make the tough decisions, like how we're going to spend our 50 million dollars."

Alan feels that in a group dynamic, it's best not to discuss each team right after they present, and wait until the last one has presented. This gives the committee time to assess what they've heard and review their matrix and notes. This also debunks the "first and last" theory where all consultant feel they have a better opportunity being first or last.

## SEEK OUT THE CLIENT'S REPRESENTATIVE (CONT.)

Reference checks are very important to Alan. He wants to know everything he can about the project manager, project architect, or job captain he'll be working with. There are firms such as Rating Source ([www.ratingsource.com](http://www.ratingsource.com)) that independently check the references you give them, and they also find more. They score both the firm and the people who are proposed for a project.

"The proper selection of a design firm is so important to us," Alan said, "as they will become part of our institution, part of our culture, part of our heritage, part of our future. We're building for 25, 50, or even 100 years. Many of our projects go through 20-30 schematic designs. We look at a number of options, and even permutations below those options to get the final result."

What Alan found was that in this committee environment that always challenged the architect to think about one more thing, "they really ended up with the best project by not just looking at the first couple of designs and saying great – let's move on," he added, "but really thought about what sort of legacy we're going to leave for the next generation."

Alan is head of the Program Management Group, Middletown, CT. He can be reached at 860-685-3746, or [arubacha@wesleyan.edu](mailto:arubacha@wesleyan.edu).

## TOP 10 LEAD GENERATION MISTAKES

By John Doerr

Leads, leads, leads. It seems it is all about leads once the referrals and the circle of family and friends aren't enough to keep our firms growing. Yet, when it comes to generating leads, most professional services firms get it all wrong in ten very common ways.

1. Spending on marketing activities that don't produce ROI or are "vanity exercises."
2. Holding unrealistic expectations about the results various marketing tactics can produce.
3. Not implementing any lead generation efforts because of inefficient decision-making.
4. Not being able to sustain implementation over the long-term.
5. Relying on one tactic only.
6. Poor implementation (e.g. poorly written marketing copy, poorly designed, or poorly targeted campaigns).
7. Dropping leads and failing to nurture leads.
8. Not communicating your value in marketing.
9. Not integrating various marketing tactics well.
10. Planning poorly for lead generation.

Planning for lead generation is not the kind of thing that happens one time and is forever etched in stone for the year ahead. When it comes to

marketing and lead generation, some tactics work better for some companies than others... and you never know which ones work best for you until you test them.

All too often in services firms there are too many decision-makers who can't get on the same page and decide what to do when it comes to marketing and lead generation. So they end up doing nothing or even worse, running "awareness ads" in business journals.

According to a research report by BPM Forum, over 80% of generated leads are never followed up, are dropped, or are mishandled. It's also been my experience that with proactively generated leads, 25% are short-term while 75% are long-term leads. If you only focus on the short-term, you might miss out on 3/4 of your opportunities.

Want to know what to do in regards to lead generation? Check out the white paper authored by Mike Schultz, Making Lead Generation Work for Professional Services to find out. ([www.raintoday.com/download/makingleads.cfm](http://www.raintoday.com/download/makingleads.cfm)).

John Doerr is a Contributing Editor of RainToday.com and a Principal of the Wellesley Hills Group, a consulting and marketing services firm that helps service companies to grow. John can be reached at [jdoerr@whillsgroup.com](mailto:jdoerr@whillsgroup.com). For the full version of the article go to: [www.raintoday.com/doerr\\_top\\_10\\_leadgenmistakes.cfm](http://www.raintoday.com/doerr_top_10_leadgenmistakes.cfm).

## DESIGNERS ARE UNIQUELY QUALIFIED TO EXCEL AT SALES CALLS

By Marcy Steinberg

Many designers bemoan the public request-for-proposal (RFP) process. A client with the authority to hire you, sans RFP, is so much better. Yet, many designers won't pick up the phone to start such client relationships. They continue to comb the public notices for RFPs. They are afraid of "cold calls" and think they aren't good at sales. After all, they are designers, not salespeople.

If only designers knew just how well their profession has prepared them to be consummate salespeople. A look at current sales lingo shows that what designers do every day is what sales people struggle to learn how to do.

### Consultative Sales

This method shifts salespeople from selling to consulting. They identify needs, they suggest solutions. They want clients to see them not as sales representatives, but as consultants.

### Conceptual Selling

The foundation of conceptual selling is reaching a thorough understanding of the client's goals, needs, and hopes, collectively referred to as the client's concept. It is the salesperson's job to get into the client's head, then conceptualize and present solutions. It requires asking more than telling and listening more than speaking. It can require site visits and other research. Sound familiar?

### Designers' Selling Savvy

The skills designers have developed in needs identification, programming, conceptualization, and design presentation are precisely those that superior salespeople use to uncover their potential client's concept, identify beneficial solutions, successfully sell those solutions, and position themselves as the consultant to turn to next time. Take a closer look at how your work makes you more prepared to sell than most salespeople are:

◆ **Discovery and Programming:** You draw out your client's goals and needs. You collect facts. You state the problem. You do this by asking the right questions at the right time, coming to a thorough and perceptive understanding of the client's true needs, and itemizing what it will take to meet those needs.

◆ **Design Concept:** Now you generate design concepts to meet those identified needs. Again, notice the parallel to what the conceptual salesperson is trying to do: analyze the client's needs and come back with proposed products and/or services to meet them.

◆ **Presentation:** You show your clients what you have designed for them, you help them visualize it, and you generate confidence, excitement and anticipation of the benefits they'll gain. Sounds like a "to-die-for" skill to the struggling salesperson!

### Apply It!

Let's review some basics when putting design methodology into a sales context.

#### 1. Never make a cold call!

Turn a cold call into a warm call with a little research.

**2. Prep your call or visit.** Review what you have learned about the client, the company, its successes and challenges, and its decision-making process. Anticipate the questions you might be asked.

**3. Determine your purpose.** What should happen as a result of this call or visit? What's next?

**4. Determine the client's purpose.** Why should this potential client accept your call?

**5. Jot down your questions.** Avoid questions that can be answered with yes or no. For example, asking how decisions are made in the company opens up a conversation.

**6. Memorize your key message.** What's the one thing you want the client to know about you and why he/she should meet with you? This statement should be short enough to leave on voice mail.

**7. Identify your proof.** How will you demonstrate that you have done your homework, know the client's challenges, and have ideas that can help? How will you demonstrate that your ideas have helped others? Think "stats and stories."

## DESIGNERS ARE UNIQUELY QUALIFIED TO EXCEL AT SALES CALLS (CONT.)

**8. Decide what to take.** What might the client want to see? What shall you use for show and tell and leave-behinds?

**9. Watch your vocabulary.** As designers who are trying to sell, you have two vocabulary challenges - "designese and salesbabble." Neither go over well.

**10. Practice.** Get someone to role-play with you. Give them some ideas of the kinds of challenges, questions or re-buffs you fear and a list of words to avoid, and ask them to "ring the buzzer" when you use them.

Applying your problem-seeking and problem-solving skills to the sales process takes practice. But, unlike many salespeople filling the sales seminars, you, as a designer, already HAVE the skills. You are uniquely prepared to sell. When you pick up that phone or head off to that visit, remind yourself that you already know how to do this!

Marcy Steinberg is Director of Marketing at Design Workshop, an Urban Planning and Landscape Architecture firm with offices in North and South America. She is the author of *The Inside Scoop: Proposals and Presentations From the Client's Perspective*, and numerous articles and presentations on marketing, writing, and strategic planning. She can be reached at [msteinberg@designworkshop.com](mailto:msteinberg@designworkshop.com) or 303-623-5186.

## DON'T GET CAUGHT BEHIND THE 8-BALL

Lorenz Architecture is a small, 3-person firm from Concord, NC., founded in 2001. With little brand awareness, they decided to use direct mail to establish initial contact with a limited list of 100 key individuals including general contractors and commercial developers, then follow up via phone to schedule face-to-face meetings. They targeted companies that routinely select firms for design/build projects.

AEC Marketing Solutions came up with a way to catch recipients' attention with the phrase "don't get caught behind the 8-ball," reminding them of their stress with past projects with other firms, and need for a call to action to contact Lorenz Architecture to avoid these experiences. A *magic 8-ball* was included in the package with the name of the firm and their web site imprinted on it, with the message such as "you can count on it" on the floating die.

At the 60-day mark of the mailing, face-to-face meetings with 65% of the list had been achieved, and nearly 95% of the recipients recalled the mailer. As one recipient mentioned when phoned, "I have played with this *magic 8-ball* every day since I received it. Thank you for sending me such a great stress reliever." Another prospect commented when scheduling a meeting, "I used the 8-ball to decide whether or not to bid a project last week. It told me 'yes' and we won the project!"

Five fee proposals valued at \$100,000 were received as of the 60-day mark, and three projects have been secured, generating revenues of \$50,000. A longer view indicated that the small firm's revenue compared to a year ago grew threefold. The connections the 8-ball campaign created along with the follow-up mailers were the reason that Lorenz got the opportunities it did.

All of this was partially the result of coming up with a short, memorable phrase and actionable item that would engage the recipient and create curiosity about getting to know the firm. It worked!

Scott E. Mickle is the President of AEC Marketing Solutions located in Charlotte, North Carolina. He works with AEC firms to improve the effectiveness of their marketing initiatives. He can be reached at 704-560-7079 or [smickle@aecmkt.com](mailto:smickle@aecmkt.com).

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# PAYING FOR RAIN

By Dennis Schrag, Ed.D

Making it rain is a very tough job. Selling work in our business takes judgment, brains, maturity, and persistence. Rainmakers should be well compensated. Most are.

Pay for performance is a very difficult issue for most firms. Perhaps some of these concepts will foster discussion and further action.

Don't get me wrong, I like rainmakers. They are the engines that drive our business. However, many sellers can become nearsighted. Many sellers are too impatient, and seek the low-hanging fruit ... much of which is not very strategic.

In relationship-based businesses, building the relationship can take a long time. Once a client is engaged with your success, inertia takes hold. Most firms can keep strategic clients for a long time.

## Each seller should have a base annual sales goal which details:

- ◆ The number of new strategic prospects (prospects who will pay, who have deep pockets, and have plenty of projects for future business). This factor in the annual sales goal might be measured in number of new clients instead of size of sale.

- ◆ Returning clients: this dollar amount might be 60 percent to 85 percent of the total annual sales goal. List the cli-

ent, their anticipated projects and dollar value for the year/sales cycle.

- ◆ Make the sales goal a stretch, but factor in the economic conditions of the markets in which the seller must operate. This goal must be a mutually agreed upon target - but be a tough boss.

- ◆ Determine the sales goal at the same time each business year.

- ◆ Winning work is one thing; making frequent contacts and building future clients is part of the entire business development scheme, too. Build in a base requirement for contacts and contact development.

The organization must have a system to monitor these contacts that lists dates, persons visited, and what information was collected. Some sellers will aim for one big sale per year and ignore everything and everyone else. Big mistake.

At least quarterly the seller and his/her immediate supervisor must have a one-on-one monitoring session. On a bi-weekly basis, the seller should report on progress and efforts made towards winning work. You can improve only that which you measure.

Client Relationship Management software can be inexpensive and very useful. With just a few keystrokes, it will automatically generate a report of contacts made and issues dis-

cussed. Most firms provide a seller with a handsome expense account.

Your firm is paying for contact information, make sure you collect it and store it. Information is power in relationship-based businesses.

To qualify for a bonus the rainmaker must achieve the base sales goal plus meet contact goals and be a fully functional team member. Projects of opportunity might carry a reduction feature - say 65 percent of the sales value. (You must be able to define projects of opportunity.)

## Establish a bonus program based upon these factors:

- ◆ Sales in excess of goals for return business.

- ◆ Sales in excess of goals for new clients. A small bonus for the first job; a better bonus for the second job from a new client; A big bonus for winning the third job from a new client. You should have the client "hooked" by then.

These bonuses might slide based upon company profitability. However, remember in tough economic times, you really need the seller's hard work.

- ◆ Projects sold and revenues received are two different things. You should review actual revenues vs. contracted revenues annually or semi-annually. Make adjustments to

## PAYING FOR RAIN (CONT.)

the seller's accounts accordingly for bonus and base sales purposes. Some jobs expand; some shrink. Pay bonuses and reconcile base sales frequently; make adjustments, even in the years that follow. Be stingy with your firm's cash. Use stock or 'stock and cash' for bonus payments. Stock helps bind the seller to the firm. It can be mutually beneficial.

Sellers can be solo fliers. Always build in an annual/semi-annual review of the seller's "fit" with the firm's values, goals and his/her ability to meet personally agreed upon goals. His/her ability to work as a team member is critical. The willingness to share information and help others is essential.

When was the last time your organization reviewed your entire seller evaluation/compensation program? Pay for performance is based upon a meaningful set of goals and a well-defined written program that is evaluated regularly.

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 with 12 domestic and 5 international offices. Contact him at [dennis@longview-group.com](mailto:dennis@longview-group.com) or at 866-351-6510.

### **Correction: January 2007**

Marketing and Leadership:  
Like Bees and Honey  
telephone number 585-421-3500, [dcreel@ecovation.com](mailto:dcreel@ecovation.com)

## GET MORE DAY IN YOUR HOURS

By Karen Susman

While it's technically impossible to get more hours in your day, here are some ways to get more day in your hours. We all waste time that we can never get back by:

- ❑ Not planning.
- ❑ Not prioritizing, thus spending big time on small matters.
- ❑ Not delegating, thus spending big time on matters that others could do better.
- ❑ Not listening, thus doing things wrong or doing the wrong things right or doing the wrong things wrong. This necessitates time-consuming repetition of instructions.
- ❑ Not doing it now.
- ❑ Not creating systems to simplify repeated procedures.
- ❑ Not knowing when good enough is good enough.

Overcommitment and procrastination give us a sense of getting a lot done while eating up loads of time. Don't confuse being busy with being productive.

### **What to do? Here are five ideas to save time:**

**1. De-clutter.** Get rid of the mess, the extra copies, the past issues, and the books you don't read or have read and won't read again, extra pens, pencils and junk. Also, de-clutter your commitments, associates and habits that spawn stacks of emotional junk.

**2. Start Now.** Don't wait to get all your ducks in a row before you get started. Do the best with what you have and then go back and correct any errors.

**3. Don't do meetings in person.** Conference calls and e-mail can save drive time and provide a concise beginning and ending to meetings. Face-to-face has many benefits, but isn't always necessary.

**4. Break the seminar junky habit.** Pick and choose conferences carefully. Factor in travel time and other costs in your decision. Perhaps you can save time and money by purchasing the conference CDs and listening in your car.

**5. Develop a list of five-minute and ten-minute tasks.** When you have a few minutes to spare, pick something from the list. Write quick tasks on strips of paper and put into a job jar. Close your eyes, pick a task and work feverishly for five minutes.

Be hyper-aware of how, who and what wastes your time. Reduce those timewasters and you'll add hours to your day. Now get busy.

© Karen Susman, Remarkable Associations, a presentation consultant based in Denver, CO. She can be reached at 888-678-8818, or [karen@karensusman.com](mailto:karen@karensusman.com). Web site: [www.karensusman.com](http://www.karensusman.com).

## Join Clients' Organizations and Associations

The fastest way to build affiliations and expand your network with prospective clients is to seek out and join organizations, associations and groups of which they are members. You will immediately be affiliated with hundreds (or even thousands) of others who could also be a client or refer one to you ... and all this by simply writing a check for your membership dues.

Do not settle for simply being a member, become an active member. Put in the time and commitment to assume a leadership role by getting involved and rising in the ranks. You will get the respect of many potential clients.

### **These organizations include, (but are not limited to):**

- Chambers of Commerce
- Professional organizations
- Business associations
- Alumni groups or clubs
- Networking or leads groups
- Charitable organizations
- Online community groups
- Womens'/Mens' groups
- Hobby/Interest groups
- Country club/Health club

Despite the internet, people still like to mingle in person with others who share similar interests and passions. There are literally hundreds of associations and groups looking for members, so it is an easy marketing move. However, once you are involved, it's easy to fall into the trap of marketing

what you do. After all, it's natural and comfortable. When it comes to business development, it's important that you invest your time and energy where you want to go, not where you've been.

- ◆ Become a sponsor of a group or organization.
- ◆ Have an open house in your firm.
- ◆ Participate in industry associations.
- ◆ Attend conferences and participate in community affairs.

Search for groups by talking to your friends and associates, look in the business calendar section of your daily paper. Visit the library. Visit one organization at a time and wait to join until checking out a meeting to see if the chemistry of the group is right for you.

### **It's never too early to start**

A Rochester AIA newsletter reported on RITs "Faces of Change" conference, open to high school girls interested in a career in science and technology-related professions. One session, "From the Ground Up" discussed the aspects of how projects get designed and built. They were teamed up with Civil Engineer designers, who pointed out the path to becoming professionals, and how their interest in math, science and technology were relevant to architecture and engineering careers.

## TOP 10 CHALLENGES FOR 2007

Participants at PSMJ's Business Development workshops were asked to identify their top challenge. Here's the results in prioritized order.

1. The proposal process
2. Marketing strategies
3. Presentations
4. Branding the firm
5. Getting PMs to market
6. Lead generation
7. Pricing strategies
8. Marketing budgets
9. CRM
10. Letting bad clients go

**A/E Rainmaker** will be addressing these and other challenges throughout the year. Let us know of any specific challenge you face, and we'll answer it for you. [Editors](#)

## CLIENTS ASK FOR MORE, BUT GIVE LESS

Many experienced clients are getting tired of all the information-gathering by firms in advance of proposals and interviews. They are reducing or eliminating their availability to answer questions. This flies in the face of their simultaneous demand for greater detail in your proposals. In response, firms are depending more heavily on direct sources such as users rather than deciders to learn about client concerns. The firms who get to know the client before the lead materializes will have a definite edge. (See cover story).

# GET IN THE FAST LANE WITH BD DASHBOARDS

Have you ever felt that you had to make business development decisions with less information than you'd like because you were waiting for end-of-year numbers? What if you could view customized timely information whenever you wanted to? Business "dashboards" make this possible, in formats as simple as Excel spreadsheets.

A business dashboard focuses information critical to the success of a firm through a series of reports that are analyzed on a regular basis. They can be updated at varying intervals - monthly, weekly, or daily. This gives real-time knowledge to make faster and better decisions.

The analogy to a car's dashboard is appropriate, where you can see how fast you're going, how much gas you have left, and how the engine is performing.

To create one you need to:

1. Identify measurements and performance indicators key to your business.
2. Know the types of information that can give you the readings you need.
3. Have an active system that collects data regularly and allows you to track indicators.
4. Have the results available at

a glance, such as a one-page printed report or a web-based interactive display.

Use the dashboard to watch for trends, whether it's lead gathering, proposal and presentation tracking, or billable hours on a project. Then constantly compile and review the information. Many businesses combine the reports with weekly or monthly meetings, where the information is reviewed and potential solutions or actions are discussed.

That is how Tony Steinhardt, CPSM, Associate Principal of RATIO Architects, Indianapolis, IN, uses his version. He constantly compiles information that goes into a dashboard report that is presented quarterly to his management team. It highlights some of the accomplishments the marketing team has completed for that quarter. Principals and management can trigger their memories to follow up on missed items, such as taking photos of a completed project.

Some of the items in Tony's dashboard include:

- ◆ A summary of proposals submitted, pending, won or lost, as well as interviews won or lost.
- ◆ Marketing time cost allocation. A comparison of all estimated vs. actual costs.

- ◆ A rundown of all media relations, including coverage, circulation and cost.

- ◆ Marketing materials. Shows items under development, by whom, and when expected.

- ◆ Other categories include: Awards, Advertising, Conferences, Events, Press Releases and Project Photography.

Tony is also beginning to share the results with clients, which allows those relationships to be strengthened. The information is also useful for future marketing and business development planning.

Tony can be reached at: 317-633-4040, [info@RATIOarchitects.com](mailto:info@RATIOarchitects.com)

## 5 TOP RAINMAKER TRAITS

1. Views growth of the firm, both professionally and with clients, a prime target at all times.
2. Has a firm grasp of profitability and respect for the bottom line.
3. A self-starter who can work independently while at the same time knows when to bring the "team" into the deal.
4. A visionary who sees the "big picture" at all times.
5. Follows-up and communicates well to the entire rain-making team.

## CLIENT RELATIONSHIP MANAGEMENT: IT'S ABOUT YOURSELF

By Stephen Hom, PE, FASCE

There are three major areas to focus on to help your project managers become more effective at client relationship management:

### 1. It's about the Process.

Knowing the difference between persuasive, consultative, and collaborative selling and learning how to use each method effectively. (See the October 2006 issue of *A/E Rainmaker*).

### 2. It's about the Client.

Learning about your client and the environment they work in. (See the January 2007 issue of *A/E Rainmaker*).

**3. It's about Yourself** – Learn about yourself and the attributes you need to develop to become better at what you do. The first step is to gain personal awareness, and many formal self-assessment instruments and processes are available to help individuals in this area. Knowing your strengths and weaknesses, interests, motivation, desires, and passions are important, but you must also be clear about your values and purpose in life, and understand what is important to you and how you want to live your life. Be honest with yourself, take responsibility, acknowledge your fears and weaknesses, learn about and understand the change process. Learning new skills, taking on new responsibilities and embracing change will

help you with your own personal and professional development. Paying attention to yourself and spending time to reflect are also important activities for developing personal mastery.

Building personal and technical skills is about continuous learning and development. Build a three-pronged program based on education, coaching/mentoring, and practice/job assignments.

- ◆ Education will help you develop the business/professional knowledge needed to sustain success.
- ◆ Coaching/mentoring provides you with a role model and advisor who can offer you a vehicle for transferring knowledge and skills, and valuable direct feedback about your performance.
- ◆ Job assignments provide opportunities for action learning on the real stage, gaining experience through practice, successes, failures, and managing risk. Whether you want to be a technical expert, a great project manager, an effective client manager, or a team, firm, industry, or community leader, learning and personal development is an important part of the process in achieving your goals.

Two of my partners were outstanding at what they did. One was a visionary leader

and entrepreneur. His creative and “out-of-the-box” thinking challenged our skills and talents and created new business opportunities. We were providing consulting services to our clients that none of our competitors thought about. His vision created enthusiasm and excitement within our firm. My other partner was outstanding at client relationship management. He enjoyed dealing with clients, solving their problems, building relationships. Clients loved working with him and continue to provide work to our firm.

So why were these two individuals so successful? They knew themselves; they played to their strengths; and they were passionate about what they did. They were also good and willing coaches and mentors, providing learning opportunities for others and developing future leaders for the firm.

These three focal areas – the collaborative process, understanding your client, and self-development – are the keys to becoming a better client manager, and developing great, mutually productive client relationships.

Stephen Hom, PE, FASCE, is a faculty member of the Advanced Management Institute for Architecture and Engineering (AMI) that provides firm leaders with the resources and guidance for developing healthy, high-performance organizations that consistently achieve successful results for the firm and their clients. Stephen can be reached at 415-722-0556. email: [shom@ami-institute.com](mailto:shom@ami-institute.com). [www.ami-institute.com](http://www.ami-institute.com)

## VALUE-ADDED WINS AGAIN

Why is the concept of value-added so powerful in presentations? Is it because the firm is giving the client free services, or simply coming up with a differentiator that no one else thought of? The answer is both. Finding something of value to offer that was not listed in the RFP is a powerful strategy. Consider the following three presentations for a new state highway bridge over a river.

The first team's presentation was qualifications-based and project-oriented. They came in third.

The second team's presentation was average. They recited the issues of the RFP, but their aerial maps and photographs were not up-to-date. They came in second.

The third team came in with water and soils samples of the project area, and their aerial maps were up-to-date. They also brought in a quit-claim deed that showed the client how to buy some adjacent property. The value-added part came about when they offered to fix part of the highway (at no cost) to ease traffic while the bridge was under construction. They won.

A value-added element is a powerful addition to your presentation arsenal. Always look for one when analyzing the RFP. Just make sure that it is something the client values.

### PRESENTATION QUESTIONS + ANSWERS

#### Q. How do you use the 45-minute presentation and 15-minute Q+A most effectively?

**A.** By reversing the order. Make the presentation short, allowing more time for Q+A from the client, then come back with response to a specific question from the review board that allows you to make other points in more detail. It really works. However, you must have prepared your presentation to allow for quick random access to information or visuals for this tactic to work smoothly.

One firm pulled this technique off quite well. They opened the presentation with a brief video outlining how the firm had just finished a different project for the same county, and had saved them a lot of money in the process. This is a hard act to top, so they concluded their presentation by opening it up for Q+A. They answered a few questions live, but when a question came up that related to the design of the project, they had a pre-prepared series of images that clearly outlined how they would approach the design of the project. The client was duly impressed that their presentation actually grew out of the Q+A part. They went into the presentation ranked number three from the proposal stage, and came out as the winner.

#### Q. What are the 3 "must haves" in a presentation?

**A.** 1. Client focus. 2. Client focus. 3. Client focus.

#### Q. What are the 3 "never do's"?

**A.** 1. Begin with long introductions of all the people on your team. 2. Mention your firm more often than you mention the client's project. 3. Forget to point out the benefits of hiring your firm.

#### Q. How do you "spice up" the presentation?

**A.** Presentations are serious business, but anything you do to address the client's project will be far spicier than focusing on your qualifications. No one ever wins on qualifications.

#### Q. How to insure a creative delivery, once we have a theme?

**A.** Presenters must express excitement about your solution. Nothing beats enthusiasm when it comes to impressing clients that you want the job. So does everyone else competing.

If you have any proposal or presentation question, send it to us and we'll answer it for you.

[Editors](#)

# A/E Rainmaker

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**PUBLISHER - Frank A. Stasiowski, FAIA**  
**PUBLISHING DIRECTOR - Bruce Lynch**  
**EDITOR - Ernest Burden**  
**ASSOCIATE EDITOR - Joy Arnold Burden**  
(contact: 212-889-4672, fax: 321-206-9220  
e-mail: www.AECadvisors@earthlink.net)

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## HEADQUARTERS/BOSTON

10 Midland Avenue  
Newton, MA 02458 USA  
800.537.PSMJ (7765)  
T: 617.965.0055  
F: 617.965.5152  
E: info@psmj.com

## ADVISORY BOARD

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Tom Sargent, Atlanta, GA  
404-705-8760  
Frank Stasiowski, FAIA, Boston, MA  
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Marcy Steinberg, Denver, CO  
303-623-5186

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