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MARKETING NOW

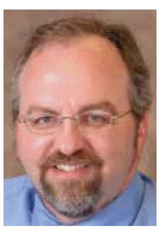
Insight and intelligence for architecture, engineering, and environmental consulting firms

RIGHT | NOW

Creating a buzz by adding a marketing business line

Firm branches out from its engineering, planning and design roots to try something new. So far, so good.

It's probably not your first inclination to hire a 30-person civil engineering, transportation design, and urban planning firm to do your marketing, but maybe it should be. At least in the case of **Shea Carr Jewell** (Olympia, WA), the new offering is already bearing fruit, attracting clients and getting people talking about a new way to do business.



Perry Shea, Principal, Shea Carr Jewell

Launched late last year, the marketing business line came about when Shea Carr Jewell hired Cathy McKay, a new marketing strategist who had worked at an architecture firm before joining the company. She had a relationship with smaller A/E firms that didn't have enough money to have their own full-time marketing director or department.

"When we thought about it, we realized there might be an opportunity for us to leverage that," says Principal Perry Shea. Shea and other firm leaders approached mechanical, electrical, general contracting, HVAC and other firms, with which it doesn't compete, with an offer to help them ramp up their marketing efforts.

"It gets down to your relationship with your clients, and the trust we have with them. The way I look at this is, it helps smaller firms that need the help with their marketing, and it makes the industry stronger as a whole."

"A lot of times, they don't even know where to start when it comes to proposals," he says. "Things are so competitive out there, you need to have a polished proposal, something that's very readable." Shea Carr Jewell's strength in editing helps that become a reality, Shea says.

In its infancy

Shea Carr Jewell's first client is Enginuity Systems, a Tacoma, Washington-based mechanical engineering firm that heard about Shea Carr Jewell's new business line through McKay, who brought the idea to Shea and his partners.

"I just followed her over," says Enginuity President Bruce Gustafson.

In the early stages of his work with Shea Carr Jewell, Gustafson says the focus has been on "planning for what I see as market opportunities." He expects the relationship, which is only about a month old, to grow and for Shea Carr Jewell to do more to spread the word about Enginuity and what it can offer potential clients.

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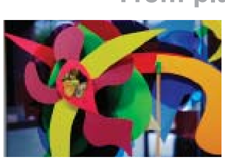
WHAT'S | WORKING

From plastic flowers to flash movies **Pages 6-7**



Who needs flowers?

Celebrating in the new economy

Happy anniversary to us!

Contribute to this feature by submitting a marketing example that is working in your firm. Contact Senior Writer Craig MacCormack at *cmaccormack@zweigwhite.com*

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ZWEIGWHITE

Marketing

From page 1

Shea Carr Jewell is on retainer with Enginuity to handle the firm's customer database and marketing collateral. The firms will also work together to create a marketing budget and scope of work for projects as they come up, Shea says.

In addition, Shea Carr Jewell is working with Tacoma-based general contracting firm Pease and Sons on procurement contracts for Department of Defense work. Firm leaders are also in discussions with at least two other companies to do retainer or project-based marketing work, Shea says.

Shea Carr Jewell is developing its business plan, Shea says, but the retainer it's getting is paying for most of the marketing costs, which are usually overhead for the firm. While the marketing business line is a small percentage of the company's revenue so far, Shea envisions it becoming as much as 5% to 10% in the next several years.

The firm provides its marketing clients weekly status reports, and looks ahead to how much time it will have for marketing work in the coming weeks and months. That helps everyone understand what's happening now and what to expect in the future.

"Right now, we're developing our business model," he says. "We want to make sure that, if the demand grows for this, we have the support staff to deal with it. We know we have to be responsive, but we have our own work we're pursuing on top of this."

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It hasn't been too tough of a sell so far to get clients interested in having Shea Carr Jewell do its marketing work for them, Shea says.

"Usually the first thing they want to know is how we thought of doing this and how we get started with it," he says. "We're thinking it might be a pretty good market since there are so many firms right now that don't have the resources to have their own marketing staff."

Shea Carr Jewell even finds itself teaming with some of its marketing clients on additional projects, such as its plan to work with a local architect and general contractor on a small business set-aside at Fort Lewis, Washington. For that project, Shea Carr Jewell is not only on the team, but it's also being paid to put the proposal together, Shea says.

Looking ahead

By the end of the year, Shea Carr Jewell could have a team of employees dedicated to its marketing business line, Shea says.

"This is an emerging opportunity for us, so we're looking to expand it," he says.

Shea isn't worried about other firms following his company's lead and adding their own marketing business line.

"There's nothing wrong with competition," he says. "It gets down to your relationship with your clients, and the trust we have with them. The way I look at this is, it helps smaller firms that need the help with their marketing, and it makes the industry stronger as a whole."

Shea doesn't see the new marketing business line as taking away from the firm's other core services, he says.

"We're looking outside the box and trying to position ourselves in markets we're not already in," Shea says. "It just makes financial sense to do this."

RESOURCES

HANDBOOK FOR SELLING: The Society for Marketing Professional Services (SMPS), in partnership with *Building News Inc. (BNI)*, recently assembled five experts to develop a new book, *Design-Build Services: A Marketing and Business Development Handbook*, to help the AEC industry succeed in design-build.

According to the Design-Build Institute of America, the percentage of the non-residential market using design-build has increased by 200% in the past 10 years and is expected to overtake traditional design-bid-build as a preferred project delivery system as early as next year.

The first part of the handbook takes the reader through the process of developing a successful design-build marketing and sales program. Using examples from successful companies around the country, it shows how to create targeted marketing plans; market services for private, public, and federal projects; research new design-build projects; create a market-driven sales force; and write successful proposals.

The second half of the handbook focuses on how to run a successful design-build practice once a project has been awarded, presenting the reader with tools for scheduling, quality control, and ensuring client satisfaction.

Topics covered include:

- How to develop a successful design-build marketing and sales program
- How to target specific marketing efforts to private, public, and federal projects
- How to meet all the special requirements for responding to a design-build RFQ/RFP

Increasing demands for speed, quality, and cost control ensure that design-build will become more and more predominant in the years ahead. For today's A/E company, this handbook opens a door to the future and provides a blueprint for getting started.

For more information or to order a copy, call 1-800-896-0793 or log on to *www.smpsbooks.com.*

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BD BEAT
Lisa Schauer

Utilize client assessments to win more work

Assessments: An opportunity to create a genuine and meaningful interaction.

Balancing the need to identify, follow up, and convert new work, as well as nurturing existing client relationships is a challenge. While marketing professionals may feel a need to be everything to everyone, it is just not possible.

In prioritizing your to-do list, I would suggest nurturing clients should be either #1 or #2 on your list. We all know chasing new work is expensive. Therefore, cultivating and converting new work from existing clients is critical. While it might not seem so on the surface, performing client assessments is a direct link to new work.

Changing client perceptions

I recently conducted an assessment with a key client that gave me an opportunity to enlighten him as to the full bandwidth of our firm. As part of the assessment— which reviewed a project completed in 2009— I asked our client for feedback that would help our firm fine-tune our proposal for future work.

Not only did he spend time with me offering opportunities for improvement, he also discussed a major project he wanted our firm to manage. We discussed the details of the project and potential team members; the client even went so far as to talk about our competitive edge, presenting me with the beginning of our sales themes. While this may appear to be a standard up-sell conversation, what was truly unique was the opportunity to talk about how one project may affect the other.

At the time, we were pursuing two projects with the client, and found that the client doubted that we had the capacity to perform all of the work we were seeking. In reality, we had carefully and strategically assembled two different teams in preparation for both projects. We planned to discuss this in the proposal, but the ability to do it face to face was priceless. Changing misperceptions can be challenging, and doing so in a written proposal can be very difficult. As a result of this client assessment, we gained valuable insight on a past project, had an in-depth discussion about an upcoming project and, most importantly, took the opportunity to alter a misconception that could have lead to a loss of future work.

Overcoming dissatisfaction

We currently have a master services agreement with a major client who has provided consistent backlog for several teams over the past two years. Last year, we were asked to prepare a program manual outside a competitive process and without demonstrating prior project experience. We felt the project was only a slight stretch. However, with unclear client expectations, logistical challenges and a very dissatisfied client, it's not surprising the client assessment did not go well.

I performed an assessment with two contacts involved in the project, and our principal in charge also met with the client to mitigate the negative perceptions. What I heard in the assessments was that this client would not "take a risk" with our firm again, but that they would continue to hire us for the work they knew we were capable of performing and pleased with. In addition, they would seek our comparable project experience before awarding us any future "stretch" work.

Recently, one of these "stretch" projects

> As a result of this client assessment, we gained valuable insight on a past project, had an in-depth discussion about an upcoming project, and most importantly, took the opportunity to alter a misconception that could have lead to a loss of future work.

surfaced and they did what we expected— they asked for our qualifications. We were able to demonstrate our similar experience, but the experience was not for the same type of client, so it could have been perceived as a "stretch."

We talked through any potential misperceptions our client may have against us doing the project, and ultimately we won the work. The bottom line was, and continues to be, it is important to take the time to ask how the project went and to share lessons you and your team have learned.

My examples illustrate that, while client assessments allow you to look in the rearview mirror, they can very much provide a path for future work.

Clearly, this isn't a function that should be delegated to someone else or downgraded in importance. Seeking your clients' frank opinion of your work demonstrates your sincere interest in not only the project you have completed but also in future work. This interaction can make all the difference in a healthy backlog.

If you are interested in a copy of our client assessment questionnaire and process please e-mail me. G

LISA SCHAUER, CPSM is a vice president at **MacKay & Sposito, Inc.** (Vancouver, WA) who is responsible for managing the firm's business development. Contact her at *lschauer@mackaysposito.com.*

AWARD WINNERS

BUILDING MUSEUM HONORS THREE: The National Building Museum (Washington, DC) has named **Perkins+Will** (Chicago, IL), a 1,700-person architecture firm; New Orleans Habitat Musicians' Village founders **Harry Connick Jr.**, **Branford Marsalis**, **Ann Marie Wilkins**, and **Jim Pate**; and the **U.S. Department of Energy's Solar Decathlon** as its 2010 Honor Award winners. Now in its 24th year, the Honor Award program celebrates the people, groups, and companies that have made important contributions to the built environment.

Perkins+Will, one of the world's largest architecture firms, was selected for its legacy of socially relevant structures for civic, education, health care, government, and private-sector clients. It is the first architecture firm selected to receive the honor. The founders of the Habitat Musicians' Village were chosen for their creation of a multigenerational village to house musicians in the wake of Hurricane Katrina. The Solar Decathlon was recognized for its commitment to educating architects, engineers, and builders— as well as the general public— about environmentally responsible, energy-efficient design.

The museum will present the Honor Awards to the recipients at a May 11 event.

Marketing staff size; professional staff and BD

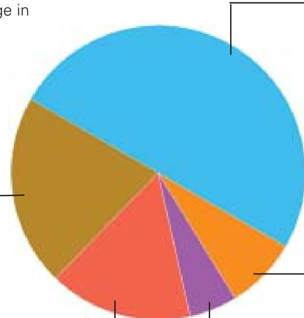
Marketing departments are not changing much in 2010 and firms are split on involving professional staff in business development efforts.

SIZING THE STAFF

Half of the respondents say their marketing staffs will remain at the same size in 2010 as they were in 2009. The other most popular responses showed some planning to add staff and others staying the same. None of the respondents plan to subtract marketing staff in 2010.

"Staff handling growing workload with less people than last year. Expectations have grown— less resources available to meet those objectives. Stress and fear of letting things fall through the cracks is growing."

What is the size of your marketing staff?



"In addition to marketing staff, we utilize a freelance writer and graphic designer. The BD staff consists of five dedicated business development managers. The smaller divisions' business development is handled by the division manager. The business development managers report to the director of marketing and business development and the division managers work closely with the director."

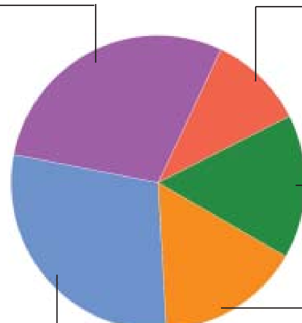
"We have stayed steady in our Marketing staff size but we hope to add at least one position in 2010."

INVOLVING PROFESSIONAL STAFF

It looks like anywhere from one-quarter to three-quarters of marketing and business development work is done by professional staffers. A higher-than-expected percentage of companies leave all or none of the marketing and business development work to their professional staff members.

"We are what we sell… so all our professionals represent what we put down on paper. I think it is essential for our potential clients to meet and greet those who will be actually producing the work."

How much of your firm's marketing and business development is done by your professional staff?



"We continue to follow a seller-doer model in most markets. Depending on the market, we're seeing this trend shift, and have begun to justify hiring full-time business development staff (specialized employees not burdened by billable hours) to develop market share or expand geography."

NEXT MONTH

Question 1: What value do you get from professional organizations?

Question 2: How are you handling social media?

AWARD WINNERS

AIA NAMES JEFFERSON WINNERS: The American Institute of Architects (AIA) recently announced the recipients of its 2010 Thomas Jefferson Awards, which honor professionals who have advanced the cause of public architecture. The winners are **Curtis Fentress**, the founder of **Fentress Architects** (Denver, CO); **Les Shepherd**, the chief architect of the Public Buildings Service at the General Services Administration (GSA); and **Ken Greenberg**, an urban planner and principal of Ontario's **Greenberg Consultants**.

Fentress is best known by many for airport designs at Denver International and Seoul's Incheon, for civic buildings such as the Clark County Government Center, in Las Vegas, Nevada, and for museums, among them the National Museum of the Marine Corps, in Quantico, Virginia.

Greenberg received the award for a practitioner who has helped raise design awareness among the public. He has designed master plans in a number of large North American cities and won praise for his ability to enroll the public in the planning process.

NOTRE DAME ARCHITECTURE AWARDS: The 2010 winner of the Richard H. Driehaus Prize for Classical Architecture is Spanish architect **Rafael Manzano Martos**, while the winner of the Henry Hope Reed Award, which recognizes non-architects who make significant contributions to traditional architecture, is Yale's legendary architectural historian, **Vincent Scully**.

The University of Notre Dame School of Architecture administers the awards. The Driehaus Prize, presented annually to a distinguished classical architect, is worth $200,000. The Reed Award comes with a grant of $50,000. The honors were formally made in Chicago March 27.

Martos, born in 1936, was recognized for his expert use of the Mudejar style, which blends Muslim and Christian influences.

Scully is Yale's Sterling Professor Emeritus in the History of Art, a hugely influential figure who has shaped the thinking of generations of Yale students and the architectural profession as a whole. He has long been a champion of historic preservation, as well as the vernacular and classical styles of architecture.

Attract new business with a well-crafted blog

Stepping on to the information superhighway doesn't have to be painful. You might like it!

Using social media as a business development tool can be a cheap and effective way to develop new business.

If your firm is interested in getting in on this trend, follow the lead of **EVstudio** (Denver, CO), an 18-person architecture and engineering firm that serves clients in structural and civil engineering, planning, interiors, lighting, surveying and sustainability consulting.

The firm started a blog in May 2008 and has found that being on the cutting edge of social media in that field is paying off.

"The original idea behind *EVstudio.info* was to provide more information on the company to existing clients," says architect Sean O'Hara, a principal at EVstudio. "As we began to see the hits grow we realized that it could drive traffic and leads to us."

Ahead of the curve

After conducting research about blogging and social media, the firm discovered there was very little competition. "We knew this meant either it was a bad idea or an idea that nobody else had gone after," says O'Hara. "It turns out that it was something that nobody else had committed to doing."

As the content grew, *EVstudio.info* became more complex, he says. "The planning for the site was largely evolutionary, which is an advantage of blogging— each post is an opportunity for developing your message."

O'Hara was the primary contributor to the blog, along with another principal at the firm. Two years later, O'Hara serves as editor, and 14 contributors write for the blog.

DETAILS

FIRM SIZE: 11 full-time, seven part-time employees

MARKETING TACTIC: Use a blog to drive traffic to firm's web site and generate new business leads

DISTRIBUTION: Internet

COSTS: Budget $180/year; about 23 hours/month

RESULTS: Generates 3-4 new leads/week; traffic doubles every six months

A screenshot of EVstudio's blog.

The firm upgraded its web site last year, overhauling the design and switching to a new hosting company.

Define your audience

The firm had clear goals in mind for the blog— one key to developing a successful site. But it also casts a wide net with its content.

"The goal is to help people to find our A/E firm and then convert the visitors into leads," O'Hara explains. "We are primarily looking for people who have not worked with an architect in the past and are thus searching for information on the Internet," he says. "Ideally our target is larger projects, but we are casting a broad net."

"We look at the blog as a shotgun approach to marketing," O'Hara explains. "We put out a lot of content because you never know what will stick. But because most of our traffic comes from searches, the people who find us were looking for a specific piece of information that an individual article covers."

Results

O'Hara says that the blog has been very successful.

"We get over 1,000 hits each day to our blog and another 150 to our web site," he says.

The firm measured results by correlating the number of leads generated to the number of hits the site gets. And those hits keep increasing: "Generally we get about 2-3% more hits each week, so our traffic doubles in roughly six months. In a 'down year' for our profession, we have been able to create a source of leads that grows each month."

"An advantage of blogging is that each post is an opportunity for developing your message."

"While our biggest and best projects are generally relationship-based, our blog has created a large number of projects," he notes. "We receive three to four phone calls or e-mail leads each week, and we've converted these leads into projects ranging from small three-hour projects to projects with fees over $25,000." Other larger projects have been offered as well.

Another goal of any marketing campaign is to create repeat customers, and *EVstudio.info* is doing that as well, O'Hara says.

Invest time, not money

One of the best things about social media, like blogs, is that they can be done very inexpensively. "There was no budget" for this project, O'Hara says, "as it was primarily about time." Experts say the key to a successful corporate blog is to keep the content fresh, and that takes man-hours. O'Hara estimates that over the last 22 months, the owners of the firm invested about 500 hours in the blog. "The expense beyond time is approximately $300 in domains, hosting and a custom theme," he adds.

"A new media blog is a way to drive traffic to a company," he says. "It takes a significant investment of time and a great deal of dedication." Slow initial results and the ability to accommodate a large variety of needs might deter some firms from blogging.

It is important to match the kinds of services your company offers to the goals and audience of the blog.

"What makes it work for EVstudio is that we are able to receive projects large and small and make them profitable," O'Hara says. "We have multiple services, both architectural and engineering, so we are able to capture more leads than many architecture-only companies."

Finally, consider having your company's top dogs contribute. "It also helps that our principals are major contributors," O'Hara says. "People want to hear from people at the top."

WHO NEEDS FLOWERS?

Each year **Hickok Cole Architects** (Washington, DC), a 65-person architecture firm, turns its design studios into an art gallery for Art Night, the firm's annual fundraiser for the nonprofit organization Washington Project for the Arts (WPA). Always a popular event, Art Night typically draws 1,000 of Washington D.C.'s designers, architects, brokers and developers, along with artists and art buyers. The social marketing event raises around $80,000 for WPA and local artists, and Hickok Cole absorbs the party and installation expenses. Art Night 2008 cost the firm $33,770, including catering, beverages, invitations, decorations, signage, photography, and other expenses. In 2009, the recession forced some major changes. The firm principals cut the Art Night budget in half, reducing the overall allotment to $16,300 and challenging the marketing team to throw a top-notch party at half the cost.

So, the marketing team recreated the pinwheel centerpieces it used at its spring gala with a new, artsy spin. Using abstract shapes cut from opaque board and transparent films, the team created colorful, 30-inch sculptural centerpieces, arranged in flats of grass for display. The eight flats of grass cost $200, while the cardstock, film, dowels and connectors cost about $230. With a little handiwork and ingenuity, the team cut the flower costs drastically. In 2008 the flowers, bought wholesale, cost $600, compared to $430 for the centerpieces in 2009.

With the concept of Colorforms for the invitations, the pieces featured a blank palette on one side where recipients could create their own original art. The mailing included an instruction sheet, encouraging guests to bring their "artwork" for display the night of the event.

Purchasing high-gloss postcard invitations through *GotPrint.com*, ordering bright yellow printed envelopes through *Envelopemall.com*, and using laser printing instruction sheets on text weight paper kept printing costs to a minimum. The final mailing came in at a much lower cost than the previous year's card: $2.30 per card in 2008, versus $1.41 per card in 2009.

The marketing team found additional ways to cut costs by reevaluating the guest list and catering strategy.

The marketing team threw a fabulous party and managed to stay within its smaller budget. More than 600 members of the D.C. art and real estate community attended Art Night 2009, generating $80,000 in artwork sales.

CELEBRATING IN THE NEW ECONOMY

Can you celebrate a milestone as important as a 50th anniversary effectively in a down economy? Is it possible to create a positive impact and newsworthy buzz on a lean budget? The answers are "yes" and "yes." While lavish celebratory parties and multiple ad campaigns may be part of the old economy for most A/E firms, it is still possible to create a lasting impression through a simple, yet effective campaign that places its primary emphasis on reaching out to the most important contacts— past clients, networking contacts, and consultants in the firm's existing database.

SB Architects (San Francisco, CA), a 70-person architecture firm, has created a series of flash movies celebrating the firm's 50th anniversary of continuous design practice. Starting with a January mailing that announced the anniversary year, the firm will e-mail four quarterly flash movies to its entire database of about 3,000 contacts. The series celebrates milestones achieved during a half-century of design practice, and set the stage for the next half century. Designed to graphically coordinate with a carefully selected advertising campaign, each movie ends with a still of the new logo created for the anniversary. The logo is also incorporated into all of the firm's marketing collateral materials and business papers, as well as on the firm's web site and e-mail signatures of every employee. The advantages of using this multi-media approach are numerous. The use of music in the flash movie adds an important, visceral dimension to the pieces, allowing the firm to evoke each era of the firm's history, not only visually, but aurally. The logo, marketing collateral and flash movies have been created in-house, so the cost of the campaign is low, enabling the firm to use its marketing budget for advertising and sponsorship opportunities that incorporate— and further amplify— the anniversary message.

Short takes on real-world marketing tactics that are producing results

HAPPY ANNIVERSARY TO US!

Randall Lamb Associates (San Diego, CA), a 62-person M/E/P and lighting engineering firm, recently celebrated its 35th anniversary in grand style with a gala celebration.

"One of the best things about throwing a party is that it makes you tidy up your house," said Olga Bastiaannet Fisher, associate principal and director of business development at the firm. "We moved into our office, a bank and appliance store that were integrated into one building, about 16 months ago. We had always planned to do something significant with the beautifully curved wall that extends 30 feet in front of large plate glass windows. The wall faces the street and is highly visible to foot traffic and cars passing by. We had a concept in mind, and a deadline of the party, so we worked with David Lecours of LecoursDesign, a marketing a brand communications firm specializing in the AEC industry, to bring it into reality."

The result is a series of mounted project photos, interspersed with a quote using the rub-down lettering often used in museum exhibits. The wall display has a life beyond the party as project photos can easily be updated as new hero projects get completed.

An elegantly designed invitation set the tone for the evening cocktail party, and guests arrived expecting a classy event. LecoursDesign also created a special 35th anniversary logo introduced in the invitation. The same logo was also applied to two front windows, with frosted film used to simulate sandblasting.

The party was an absolute success. Many of the guests indicated that they didn't want to leave despite having previous commitments. Then again, it's tough to compete with a sushi chef handcrafting edible delicacies, a great crowd, and a beautifully designed office.

"We were extremely pleased at how successful the open house was," says Executive Vice President Chris Lloyd. "In addition to celebrating 35 years with our clients, we were showing off our new location in San Diego, after an extensive renovation of a circa 1940 Art Deco building. The building has proven to be a healthy and very pleasant environment in which to work, and we are pursuing LEED Certification. The melding of the old with the new was showcased in a display at our open house, and our anniversary logo was highlighted throughout the sequence of events. All of that added to the event's success, and the feedback we received from our clients confirmed that."

Here's the pitch... and the win— if you do it right

Know yourself and your market, show the love, and connect to the client to get the job.

Having trouble getting new work? It could all turn around for you in three easy steps.

OK, so it's not a foolproof plan, but if you try to follow the tips laid out in "Pitch to Win: Winning When Opportunities Are Scarce," a webinar hosted by the Society for Marketing Professional Services (SMPS) in mid-March, you probably will be pleased with the results.

First, you should know yourself and your target market. The second step in creating better pitches is showing love to your potential clients from your first contact with them through the last, and the third way to pitch to win is by connecting with the client in as many ways as you possibly can.

"At times like these, you want to make sure you do as well as possible with the few opportunities that are out there," said Joey Asher, president at communications consulting firm Speechworks in Atlanta, who co-presented the session.

What type of firm are you?

Co-presenter Karen See, co-founder of Clarity Close Win Consultants and former senior vice president of marketing and business development at **HOK** (St. Louis, MO), said that keeping your approach simple is the best way to yield better results.

"It's so easy to feel panic and to want to chase everything, regardless of whether you have experience in doing it or not," See said. "These are the times when it's critical to know yourself— what makes your firm unique and the market you're trying to serve."

Firms should determine whether they want to be thought of as client-centric (such as the Ritz-Carlton hotels or other luxury brands), creative innovators (such as Steve Jobs at Apple, Inc.), or a company focused on operational excellence (such as Wal-Mart), See said.

"Every firm needs to do all three," but one needs to be the major focus, she said. During tough economic times, See said, most customers focus on firms that are client-centered or those who emphasize operational excellence. Client-centric firms are known for their strong service, while operational excellence firms are highlighted by strong delivery. Creative innovators are best remembered for strong ideas, she said.

The base of the "pitch pyramid" is selling, whereby the company proves its value. That's followed by branding (how you become preferred over others), marketing strategies (how you get your solutions to buyers), innovation (how you develop solutions for buyers), market insight (how you know what people want to buy), corporate vision (how you want others to think of you), and the brand (what others think of you).

"Your brand is not up to you," See said. "If you can't articulate your key differentiator in an emotionally evoking way, you need to figure out how to do that."

Show the love

During the buyer-seller process, "you never know when an opportunity will present itself," See said. "You have to always be out there networking. For you to have a viable chance at winning the job, you have to know something about your prospect."

There's always a way to overcome seemingly insurmountable obstacles, Asher said.

"Sometimes, a client only cares about the price," he said. "Some will pay for that extra level of service, but you need to show it and help them understand why it's worth it to pay a little bit more."

> "A good business developer can find his or her way into almost any company with a couple of phone calls."

Firms should use the six-degrees network, meaning finding a connection between themselves and the potential client in six steps or less.

"A good business developer can find his or her way into almost any company with a couple of phone calls," Asher said.

Start with the prospect, then expand the search to the management of that prospect. From there, see if there are any funding resources in common, or even strategic partners or service partners with whom you've both worked. If that fails, there's always the social networking route, he said.

Connect to win

When it comes time to do your pitch, organize your presentation into three listener-centered points, present in a style that connects, and practice like crazy, Asher said. Starting a presentation with, "We understand that you..." engages the prospect, he said.

Make your point and illustrate it by giving them a plan and telling them your story. Remember, also, to present in a style that connects, Asher said, using passion and eye contact in your presence as well as excitement and intensity in your voice.

"Everything you do has to say, 'I really care about you and this job'," he said. "If you don't understand what the client's issues are, you probably shouldn't be competing for the job in the first place."

CALENDAR

BUSINESS DEVELOPMENT SEMINAR: The ZweigWhite Management Series on Business Development is an interactive program that will help your employees become skilled at identifying business opportunities and turning those opportunities into actual projects. Find out how to create persuasive proposals and presentations, secrets of negotiating and closing the deal, and what will make the critical difference in nurturing rich and enduring client relationships.

The seminar is loaded with useful how-to information, offered in presentation, discussion, and action-oriented working sessions. Attendees will receive a free electronic copy of ZweigWhite's *A/E Business Development Cookbook*. You'll get a chance to tap into ZweigWhite's two decades of experience in helping A/E firms improve marketing and business development, and have a personalized, take home plan for Monday morning. You'll also enjoy follow-up access to the seminar instructor for enhanced accountability. Dates and locations for this one-day seminar include April 7 in Chicago, June 15 in Los Angeles, and Sept. 9 in Seattle.

For more information or to register, call 1-800-466-6275 or log on to *www.zweigwhite.com/seminars/bde/index.asp*.

GUEST SPEAKER

Kelly Teenor

Insight into embarking on an e-mail campaign

It won't go the way you expect the first time, but that doesn't mean you should give up.

Send? Yes.

One easy key stroke launched our e-mail campaign to clients, prospects, agencies, and project partners. In March, **Hall & Foreman, Inc.**, a 40-person Tustin, California-based civil engineering and surveying firm, began a monthly e-mail newsletter campaign. Hitting "send" was the culmination of many decisions and actions that went into the campaign's development.

E-MAIL CAMPAIGN GLOSSARY

- **Bounces**: E-mails that come back to the sender as undeliverable. A hard bounce could be caused by an invalid address or triggering of a spam filter. A soft bounce may be the result of a full mailbox or temporary server problem.
- **Click-throughs:** The action taken by the viewer who clicks on a link provided in the e-mail. The link takes the viewer to the sender's desired destination.
- **Landing page:** The page the viewer lands on after clicking a link. The page typically offers more information about the subject mentioned in the e-mail.
- **Spam triggers:** A list of 200+ words that could trigger junk and spam filters is provided by Steven Greene at: *www.salesnexus.com/spamwords.php.*

With the process fresh in mind, I share lessons learned and tips for creating a successful campaign.

HFI's electronic newsletter is an educational tool as well as a promotional one. Each edition will provide information to recipients about issues that affect their projects while generating attention to our services. Links and landing pages give viewers access to details about topics they can explore further.

Our inaugural issue was sent to a list of 1,600 e-mail addresses. Tracking analysis gave us data on a variety of viewer actions, including which links were used, what percentage of e-mails were undeliverable, and who forwarded the e-mails on to others.

We set a goal of getting a 3% response from each issue. We were pleasantly impressed when we received a 45% click-through rate. That is the percentage of viewers who clicked to at least one link or landing page. A review of the specific click-throughs proved that people like pictures. The links associated with pictures received more click-throughs than the links with no pictures.

What came as no surprise was our 18% bounce rate. The economy has taken a toll on our residential and commercial clients. Many people have changed companies or roles within the industry.

We knew this was happening faster than we could update our database. Now, we can use our bounce list to research the status of those folks so we can reconnect with them. This is our database spring cleaning project.

Moving forward, we will clean up our current database, expand our distribution list, and continue to use pictures to drive click-throughs. Here are some tips you can use when embarking on an e-mail campaign:

What to do before you hit "send"

Set your objectives. Why are you doing an e-mail campaign? Establish a purpose statement and set measurable objectives. Make sure your campaign service provider is set up to track viewer actions, bounces, opt-outs, and new subscriptions.

Decide on a service provider. Will you manage distribution in-house or outsource it? We chose to outsource so we could tap into a specialized e-mail campaign management infrastructure. To select a service that best matches your needs, keep these criteria in mind:

Pricing: What is their minimum/maximum volume requirement? Many pricing structures are based on the number of e-mail addresses you send to on a monthly basis.

Template designs: Do they offer a customized template, branded for your firm, or is it a one-size-fits-all format?

Response tracking: What type of data is captured, how do you retrieve it, and how long is it stored?

Landing pages: Do you need the service to host landing pages or will you drive traffic to pages hosted on your web site?

Opt-out: How do they handle opt-outs? You want to be compliant with Can-Spam regulations.

An e-mail campaign is an extension of your branding efforts. Tagline, font style, colors, and message tone are elements that should mirror your marketing materials.

Branding

An e-mail campaign is an extension of your branding efforts. Tagline, font style, colors, and message tone are elements that should mirror your marketing materials. Be sure to complete your brand strategy before launching the campaign.

Project management

Allocate time to perform the many tasks associated with the front end set-up and back end maintenance. You will:

- Go through the learning curve of working with the service provider (either in-house or outsourced)
- Produce the template, create content, and identify the calls to action
- Develop landing pages and add them to your website
- Prepare the distribution list.

After distribution, plan to:

- Follow up on the responses to your calls to action
- Analyze the statistics of the campaign, such as click-throughs, so you can prepare the next issue
- Clean up bounced e-mail addresses.

Get your web site in shape

E-mail campaigns usually drive traffic to your web site so make sure your web site is current. You'll offer links to landing pages that expound on content or contain calls to actions. If you don't already have an analytic tracking program on your site, install one.

Tracking gives you insight into how visitors are using your site and the content they spend time with. G

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GUEST SPEAKER

John Dietrich

Find work by finding the decision makers

Cultivating the right people is a difficult, but simple task.

I heard a dynamic political figure once say something to the effect: The answers in life are never easy, but they are simple. The last 18 months have been particularly challenging for our industry, and the furthest thing from easy. In search of the answer to the simple question, "How can we create more revenue?," I have attended some of the industry's most respected marketing and business development conferences and been fortunate enough to be in the attendance at presentations by dozens of motivational speakers from all over the country.

We all want to know: What is the secret? What are the competitors doing? Do we cut costs? Or, do we ramp up marketing?

Riddle me this, riddle me that...

There are definitely no easy answers to these questions, but today our industry shares these common challenges and we remain determined to help our organizations increase revenues and remain profitable.

But I will say the solutions to these challenges are simple.

That is why I have challenged the marketing department at **Ulteig Engineers, Inc.** to keep a very *simple* philosophy as we help our employees bring in sustainable sources of profitable revenue. Three very simple questions come to mind as we approach our marketing and business development model at Ulteig: Who are the clients that we want to do business with? Who are the decision-makers for those clients? And what is our plan to get in front of those decision-makers?

If we are going to close the deal, we must get in front of the client.

Just as a compass always points north, our behavior should always point toward these fundamental business concepts. In fact, having a firm business compass is what will help you navigate through the most difficult of times.

Marketing in a down economy is difficult for any company, no question. But a downturn is also an opportune time to redouble your company's marketing efforts and target the desired client. However, let us take this simple business concept one step further by assuming you know which client is atop on your list. Perhaps it is the department of transportation or the government. Perhaps it is a private firm with 75 employees. Regardless, of the fact is that— in all probability— the decision-makers are just a handful of people embedded somewhere in the organization.

Let me get straight to the point: Find those decision-makers. Know their names. Know the committees that they serve in the community, and then figure out a way to not only join the committee but sit next to them during meetings. And, if possible, know what charities they hold dear to their hearts, and if your organization coincidentally holds those same values, support those causes also. In other words, be on the same sheet of music as your clients. It's a win-win situation because this process will also help you identify those clients who best share your values, not just your vision. Sooner or later you will find yourself chatting with these clients in the grocery store, asking how their children are doing, and knowing what truly drives their business decisions.

Guess what? You are now well positioned to ask for their business and partnership.

Find those decision-makers. Know their names. Know the committees that they serve in the community, and then figure out a way to not only join the committee but sit next to them during meetings.

You are now better positioned to close any future deals. In fact, you may even find that this client feels bad about *not* giving you more work.

Here is an example of how Ulteig approached this strategy in 2009. With a vision for getting in front of a private sector client, Ulteig realized that we needed to identify the decision-maker if we were to have a realistic chance to close the deal. Ulteig did not originally know the decision-maker for this client, but we did have a business partner who knew the client quite well. Ulteig leveraged this business partner to set up a meeting with the client and tour their facility. The client was also kind enough to have dinner with our employees and business development manager. This strategy has resulted in both companies working out the terms and agreements of Ulteig becoming a preferred vendor and business partner.

Keep it simple, but also remember that the processes we choose to drive revenue through the door should always be accompanied by a little art and craft. Don't wish things were easier, because most of the time there will be no easy answers. The answers in life are not always easy. However, the solutions are simple. G

JOHN DIETRICH is an executive vice president of marketing at **Ulteig Engineers, Inc.** (Fargo, ND). Contact him at *john.dietrich@ulteig.com.*

CALENDAR

SMPS NATIONAL CONFERENCE: The 2010 Society for Marketing Professional Services (SMPS) national conference, Build Business: Reinvent. Retool. Rebound, July 14-16 in Boston, will bring together today's leading marketers and business developers to explore the lessons learned and strategies firms put in place to respond to and overcome the current challenges in the A/E/C industry.

You'll learn: Did firms retool their business development, marketing, management, or human resources practices to weather the storm, minimize the damage, and prepare for a rebound? How did companies reinvent themselves, adapt their message, or alter their brand?

A secondary focus of the educational program is to thoroughly explore the impact and potential that social media and digital marketing offer marketers and business developers as we enter the Web 3.0 world. Can social media and digital marketing be forces in A/E/C marketing?

For more information or to register, call 1-800-292-7677 or log on to *www.buildbusiness.org.*

GUEST SPEAKER
Tracy Black

Drive strategic marketing culture with go/no-go form

Being informed and targeted can be the difference between winning and losing pitches.

Maximizing your marketing resources to achieve results has never been more important than now. And we all know that informed strategy, good decision-making and efficient processes can increase return for investment. At **HMC Architects** (Ontario, CA), a 400-person architecture firm, we recently found that the key to driving a more strategic marketing culture came in the form of a form: our go/no-go decision-making form.

Nobody likes forms; especially those go/no-go forms that have been floating around the industry for decades. HMC had been using one for years, only to find that it didn't really get the results that it was designed to achieve. As we sharpened our business strategies and implemented a more rigorous structure of accountability, it became apparent that the form had several major flaws— or "cultural loopholes." In other words, people found ways to get the required score without much thought, and the process itself was allowing behavior that didn't support the culture we were trying to build. And as the economy fell, we also fell— right back into a shotgun approach to pursuing projects.

So we set out to close the cultural loopholes and develop a more strategic marketing culture.

First, we looked at our strategic plan, mission, vision and values. We also looked for patterns of past success. Then we examined our existing form and process along with best industry marketing practices. This helped us identify the loopholes and create a vision for what our ideal process would look like.

Next we crafted the components of the form. There are several basic categories that need to be evaluated: relationship to the client, experience and expertise related to the project, and quality of the competition. In each category, we identified the specific criteria that we knew would determine success— for us.

Then we customized, prioritized and weighted the criteria. For example, we recently implemented a program to categorize clients as existing, high potential, or future potential, so the first item on our form assigns a value based on those three categories (12, 11 or nine points, respectively) and zero points for a client with little or no established relationship. You can see how weighting the points can dramatically affect the scoring— if the client hasn't been on our radar screen, it's pretty hard to make up nine or more points. We determined that having an established relationship with the client is the most important factor for our success— and the place where we had the most loopholes— so we gave it the most points and no room for interpretation. As a bonus, we found that by incorporating another HMC process into our form (client categories), we culturally reinforced both processes.

Next, we looked for other criteria that would support the cultural changes that we wanted to make. For example, we wanted to minimize last-minute decisions (that keep the marketing staff up past midnight and result in poor-quality proposals), so we incorporated criteria for how early we learned about the RFP, how much time we had to respond, and whether or not the right people were available to put together a quality proposal. Points add up (or subtract) quickly.

We also wanted to promote a more collaborative approach to support organizational changes driven by our strategic plan, so we added check boxes to make sure the right people were involved in evaluating every pursuit.

Looking beyond the go/no-go process, we also saw an opportunity to improve our proposals and presentations. For example, we struggled with developing compelling strategies that addressed the client's issues in the proposal (and minimized boilerplate), so we added required fields for the client's hot buttons and our relevant differentiators. Those answers are reviewed (sent back when necessary) and transferred directly onto our proposal and presentation process tools to reinforce strategy and differentiators consistently throughout the pursuit.

In the end, our form has 17 criteria in five

There are several basic categories that need to be evaluated: relationship to the client, experience and expertise related to the project, and quality of the competition. In each category, we identified the specific criteria that we knew would determine success— for us.

categories and the weighted scores equal 100 for a "perfect" pursuit. The spreadsheet calculates the points and assigns a traditional letter grade (A+ down to F), for easier discussion. Each grade requires a different level of approvals, which allows lower scores to be considered for strategic reasons, but only with buy-in from key leaders. An additional field is provided to note justification for pursuing a project with a low score, as well as mitigation strategies. We didn't want to create a form that dictated an answer— but rather a tool to encourage strategic, collaborative decision making.

Rolling out the new form was less painful than expected because it aligned with our strategic plan and supported the cultural behaviors we were encouraging across the organization. We had a few old dogs cringe at the two-page form, but once they started using it, and saw how easily it supported good decision-making and increased ROI, it quickly became accepted practice. And the best feedback came from a recently hired principal, who said, "This go/no-go form is better than any I saw at (two well-known national firms) in 17 years. Good job!" And our marketing measures also show that our efforts are paying off, even in this tough economy. No shotguns here. And no more loopholes.

TRACY BLACK is the vice president of corporate marketing at **HMC Architects** (Ontario, CA). She can be reached at *tracy.black@hmcarchitects.com.*

Complaining won't get you a corner office

Hard work and focus on improving your firm will get you noticed.

Catherine Noyes Malicki is a principal and vice president of corporate marketing at **SSOE Group** (Toledo, OH), a 950-person engineering, procurement, and construction management firm that was 25th on *The Zweig Letter*'s 2009 Hot Firm List. With 19 offices around the world, SSOE is a leader in providing sustainable and renewable solutions. The company has earned a solid reputation providing architecture, engineering, procurement, and construction management services to the healthcare, automotive, science and technology, energy, alternative energy, biofuels, chemical, food and beverage, glass, and consumer products industries. SSOE has completed projects in more than 30 countries.

Catherine Noyes Malicki, Principal and Vice President of Corporate Markting, SSOE Group

Malicki has worked at SSOE since October 2005, becoming a partner in 2006 and bringing 20 years of experience to the marketing department. She leads SSOE's corporate marketing, public relations, communication and branding initiatives. Here, she shares some thoughts with *Marketing Now* readers.

***Marketing Now*: How and why did you get into this profession?**

Catherine Malicki: "Completely by accident. I was working my way through college and took a temporary position as 'chief data entry clerk and head file maker' with an architectural/engineering firm's accounting department. I was charged with entering all the client and project information into a new accounting program. This was in 1989, when marketing was a novelty for most firms and we didn't have a formal department. I was transitioning majors from graphic design to marketing and realized that there was an opportunity for me to use my knowledge of client and project history, and practically apply my marketing and graphic skills to help drive the business.

"My contract ended but I kept working, bringing in samples of brochures, reworking proposals and drafting marketing plans. They offered me a full-time position to help start the company's first marketing department in 1990. We grew from less than 100 people to 520 people in a few short years. SSOE bought the firm in early 2005. So, many of the people I work with today are familiar faces."

***M.N.:* Why did you choose this market?**

C.M.: "I don't know that I did. Looking back, I'm fortunate it all fit together so well. I started my college experience majoring in interior design, then architecture, then graphic design. I ended up switching to marketing. Who knew years later I could combine all of those experiences into a career? It wasn't a master plan, but it worked out well. My initial inability to commit to a major prepared me perfectly for this profession where every day is different— the variety keeps me energized."

***M.N.:* What is your proudest professional accomplishment and why?**

C.M.: "I am very proud the job I had in college directly led to the career I have today. Some of my most important lessons were learned through this experience. Don't burn your bridges. Work hard. Seize opportunity. Embrace the discovery process. Be bold. Admit mistakes."

***M.N.:* What is your least satisfying professional experience and why?**

C.M.: "Work/life balance. It's a challenge getting it all done. We have four daughters, and my husband works full-time as well. It's tough. Balance is not a destination; it's a lifestyle that I work to steady every day."

***M.N.:* What do you do to recharge your batteries?**

C.M.: "I would love to say I exercise like a fiend, but I'm afraid someone who knows me will read this. I have a great family and wonderful friends. I love spending time with my family, cooking, painting, and hiking. I'm also writing a book about growing up in East Tennessee."

***M.N.:* What does it take to make it in the marketing field in the AEC industry?**

Catherine Malicki: "A few descriptors come to mind: Curiosity. Strategic perspective. Thick candy shell. Focused. Juggler. Flexibility. Humor. Approachability. Decisiveness. Perspective. Organization. Enthusiasm."

***M.N.:* What should newcomers absolutely know about this job?**

C.M.: "You need to be organized, enthusiastic and patient... in addition to all of the attributes listed above. Be ready to do whatever it takes: punch holes in handouts, run— literally— a submittal down the street, work crazy hours without notice, all with a smile on your face. Hard work and good attitude will get you far and pays off in spades. Bust your hump every day. Work as if your job depends on it, because it does.

"My father says, 'It's easier to slow down a fast horse than speed up a slow one.' Don't be afraid to try new things and keep the ideas rolling. If a company doesn't appreciate your energy, find one that does.

"Strong leaders with growing firms look for energized and enthusiastic newcomers. Your degree can only get you an invite to the dance. Your chutzpah and zeal carry you the rest of the way. You don't get respect and opportunity unless you make a difference. Understand why you're there.

"The office or corner cube doesn't come without hard work. We don't work for marketing firms; our focus is on design and construction."

To read full interview, log on to *www.aemarketingnow.com*

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