

On the topic of surveys

The gray areas, the nuances, and the reasoning behind them.



Marilynn Mendell

GUEST SPEAKER

The other day I lost a client to a competitor. It happens. Many excellent shops exist. What triggered the idea for this article came about for another reason. The prospective client said the other consultant intended to survey 30 of his clients before doing anything else. Anyone out there see something terribly wrong with that? Hold that thought.

Surveys serve many purposes. Their timing, like so many other things in life and business, must be factored into the equation. It can take months for an outside consulting firm to get to know a company, their projects, and gain their fundamental desired outcomes for the entire effort.

Surveys hold the potential to be effective sales tools. Surveys need to match or be aligned with firm marketing goals and strategic plans. Great survey questions get created by both the consultant and the client. Anyone can write questions and cold call total strangers on your behalf (saving you, the introvert, the horrible task of reaching out and actually speaking with someone). However, not everyone can turn a survey call into an opportunity for future growth, for brand reinforcement, to discover holes in the fabric of your marketing efforts. The personalized touch of an in-house well informed and trained questioner far exceeds a total stranger's approach.

Don't be fooled by the third party routine either – "People will tell us more than you." Really? Would you? I'd take a call from my friendly ConstantContact technician because I know and like her. I'd be happy to give valued vendors feedback on what they could improve.

Being able to touch your best clients at the principal level gives outside consultants one other important thing: Direct access (with your recommendation) to future clients for them. And let's say you really do want to hand off the task to someone else. My final argument for "don't do that" is that every market is – here's a word I don't use often – unique. D.C. is different from Billings, Mont., which is different from Boston. Someone who works with toothpaste manufacturers may not understand the real estate market. A notable exception would be Palo Alto, Calif.-based design thinking firm **IDEO**, and they do a boatload of research before playing around in waters they haven't walked across. Great outside consultants obviously have high ethical values, good intentions, and they work closely with clients to

Fundamentally, a survey must provide more than a gut check. It's a marketing and sales opportunity, and it takes a great deal of planning and subtlety to be able to steer the client in the direction intended.

ensure the widest range of positive outcomes. I'm just making a point for any survey to be a well-thought-out team effort.

In the long run, the bottom line increase and advantages generated by a long range plan of carefully conceived objectives will be enormous and you won't wake up in a year and feel as though you just threw money down a rat hole. With or without a consultant, an in-house survey of your employees always comes first. To be able to sell a company properly the principals and the greater body of the employees must be in alignment with corporate goals and values. If not, then work needs to happen to illuminate corporate direction and cement correct concepts in everyone associated with your firm before speaking with XYZ's clients. That's why strategic planning in-house comes before anyone reaches out to clients. If you don't already have plans in place, or annual review of strategic plans, you're not alone. Few companies regularly lay out corporate directions, utilize marketing plans, or take the internal corporate pulse annually. Start now. Work as an internal committee or with an outside consultant

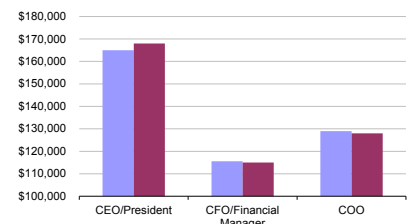
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Resentment for the money-maker

If you are a target of bitterness, here's four tips from Mark Zweig on how to deal with it.

TRENDLINES

Upper level



Zweig Group's 2015 Salary Survey of Architecture, Interior Design, and Landscape Architecture Firms finds that the median base salary for CEO/President/Managing director increased from \$165,000 last year to \$168,000 this year. Meanwhile, CFO/Financial manager median base salary dropped slightly from \$115,550 to \$115,000 and chief operating officer base salary declined from \$129,000 last year to \$128,000 this year.

— Margot Suydam, Director, Research

TO OUR READERS

In observation of the upcoming Thanksgiving holiday, THE ZWEIG LETTER will not be published on Nov. 24. We will return on Dec. 1. Happy Thanksgiving!

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It would be one thing if the people we are talking about were jerks or lorded their power or accomplishments over others. But the ones we are talking about aren't. They are nice, self-effacing, and know how to treat others.



Mark Zweig

EDITORIAL

On a recent flight to go see some clients in South Florida, Chad Clinehens and I were talking about how we've both witnessed an extremely dysfunctional situation in a number of firms we had both worked for: Resentment for one or more of the company's top performers.

In several of the cases we discussed, this "top performer" also happened to be the CEO in a multi-owner firm. We're talking about the people who sell the most, make the most profit, and generally, make most good stuff happen at the firm. Yet some – or many of the other principals or partners – can't wait to get them out of the firm and out of their way.

It would be one thing if the people we are talking about were jerks or lorded their power or accomplishments over others. But the ones we are talking about aren't. They are nice, self-effacing, and know how to treat others. You'd think everyone would love them, honor them, and thank them for all their help in making an outstanding living and creating a valuable firm. Instead, they are often the subjects of plots to get the King off his throne.

So the question is: WHY are these money-makers resented and what can

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PORTFOLIO

would anyone recognize you?

send your profile in for review

Click "send profile" to send your message and have them approve

Fill out your profile

Connect to more Cardno colleagues

A/E BUSINESS NEWS

CONSTRUCTION STARTS TO RISE IN 2015 Dodge Data & Analytics' (www.construction.com) 2015 Dodge Construction Outlook predicts that total U.S. construction starts for 2015 will rise 9 percent to \$612 billion, a larger gain than the 5 percent increase to \$564 billion estimated for 2014.

"The construction expansion should become more broad-based in 2015, with support coming from more sectors than was often the case in recent years," said Robert Murray, chief economist and vice president for Dodge Data & Analytics. "The economic environment going forward carries several positives that will help to further lift total construction starts. Financing for construction projects is becoming more available, reflecting some easing of bank lending standards, a greater focus on real estate development by the investment community, and more construction bond measures getting passed. While federal funding for construction programs is still constrained, states are now picking up some of the slack. Interest rates for the near term should stay low, and market fundamentals (occupancies and rents) for commercial building and multifamily housing continue to strengthen."

Based on research of specific construction market sectors, the 2015 Dodge Construction Outlook details the forecast as follows:

- Commercial building will increase 15 percent, slightly faster than the 14 percent gain estimated for 2014. Office construction has assumed a leading role in the commercial building upturn, aided by expanding private development as well as healthy construction activity related to technology and finance firms. Hotel and warehouse construction should also strengthen, although the pickup for stores is more tenuous.
- Institutional building will advance 9 percent, continuing the moderate upward trend that's been established during 2014. The educational building category is now seeing an increasing amount of K-12 school construction, aided by the financing made available by the passage of recent construction bond measures. Healthcare facilities are expected to show some improvement relative to diminished activity in 2014.
- Single family housing will rise 15 percent in dollars, corresponding to an 11 percent increase in units to 700,000 (Dodge basis). It's expected that access to home mortgage loans will be expanded, lifting housing demand. However, the millennial generation is only gradually making the shift toward homeownership, limiting the potential number of new homebuyers in the near term.
- Multifamily housing will increase 9 percent in dollars and 7 percent in units to 405,000 (Dodge basis). Occupancies and rent growth continue to be supportive, although the rate of increase for construction is now decelerating as the multifamily market matures.
- Public works construction will improve 5 percent, a partial rebound following the 9 percent decline estimated for 2014. Highway and bridge construction should stabilize, and modest gains are anticipated for environmental public works. Federal spending restraint will be offset by a greater financing role played by the states, involving higher user fees and the increased use of public-private partnerships.
- Electric utilities will slide 9 percent, continuing the downward trend that's followed the exceptional volume of construction starts that was reported during 2011-2012. With more projects now coming online, capacity utilization rates will stay low, limiting the need for new construction.
- Manufacturing plant construction will settle back 16 percent, following the huge increases reported during both 2013 (up 42 percent) and 2014 (up 57 percent) that reflected the start of massive chemical and energy-related projects. Next year's volume remains quite high by recent historical standards.

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they do about it, if anything? If YOU are one of these people, here's my advice:

1) Don't get distracted by it. Your goal – your need – is to perform. If you don't perform, everyone suffers. So don't get too worried if the lesser performers are jealous and talking trash about you. You have to do what you have to do anyway!

2) Over communicate, particularly face-to-face. People have to know you care about them and that you are not a jerk. This is REALLY hard, especially if you are the busiest person in the company and travel a lot so you just aren't there – and when you are, you're backed up. It doesn't matter. You need to make two or three times the effort other people do just the same.

3) Do you best to share the credit. Always deflect praise to other members of the firm or your team. The more you can do this, the better. Other people will like you more. You know

Do things that show how nice and compassionate you are. Every act of kindness from you will help you build up your goodwill reserve.

what you do, anyway. No need for you to be insecure.

4) Do things that show how nice and compassionate you are. Every act of kindness from you will help you build up your goodwill reserve. It's important that you – as a high performer – do this. While you shouldn't be a target, you will be. Our firms are filled with insecure, egocentric people.

Do any of you have any ideas on this topic? If so, send 'em to me. Until then, I'll see you next week! ➤

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What is your firm's relentless pursuit?

All want to be better in general, but here are the specifics on how they are attempting to do that.

By LIISA SULLIVAN
Correspondent



Humza Chowdhry,
Principal, HC
Structural
Engineering, Inc.

Whether by design or simply born out of a client need, most firms regularly obsess over something – and pursue that something relentlessly. These four firms share one common obsession – being better.

PUTTING PEOPLE FIRST. Lance Dozier, marketing manager at **GATE, Inc.** (Houston, TX), a 135-person oil and gas engineering company, says that its relentless pursuit is to partner with clients to deliver a project that works right the first time.

“We strive to communicate to our clients that their projects matter. We believe in our people and their ability to deliver complex scopes of work as well as coordinate multiple teams to make a client’s intended design become reality,” he says. “Simply put, we aim to exceed expectations in everything that we do.”

“We strive to communicate to our clients that their projects matter... Simply put, we aim to exceed expectations in everything that we do.”

Dozier says that this pursuit blends design, client needs, and the perception of what GATE does best. President Grant Gibson founded GATE from a desire to not only be a Best Firm To Work For, but to also provide unparalleled customer service.

“After many successful projects, clients have come to trust GATE and expect exceptional service delivery. This in turn has fueled the perception of GATE being a world class engineering consulting company that puts people first,” Dozier says.

A DRIVE TO BE BETTER. At **HC Structural Engineering, Inc.** (Daly City, CA), an 8-person firm, Humza Chowdhry, principal, says that they have a burning desire to be better.

“Investing in the younger generation to develop innovative ways to deliver a better product tops our list,” he says. “We are providing young dynamic energy to the field of engineering, which is typically governed by old timers who shrug for change. Our

energy is shown in the way we handle our customer service, our interpersonal skills, and even our formal dress code.”

Chowdhry explains that the relentless pursuit to be better stems from a combination of things.

“We are providing young dynamic energy to the field of engineering, which is typically governed by old timers who shrug for change.”

“Being a young firm, we had to develop ways to stand out from the many other firms out there,” he says. “Part of that task was to look at the field from a client’s perspective to see what was important for their needs to be satisfied or even exceeded.”

It is this concept of doing better and pursuing perfection that allows HC Structural Engineering, as a firm, to reflect on what they are doing right – and wrong.

KEEPING A NICHE. John McGrath, COO, **Advantage Engineers** (Columbia, MD), a 180-person firm, says that they continue to strive to improve their standards and practices every day, with an emphasis on long-term growth.

And, Advantage provides specialized engineering services that will remain just that – specialized.

“We have no desire to be all things to all people. Instead, we endeavor to constantly improve our service and technology capabilities,” McGrath says. “As we strive to provide our clients with the highest level of client satisfaction, we do so with the understanding that we must continuously improve our processes, our knowledge and our skills.”

Advantage’s engineering and technical professionals are directly involved in each project in order to provide clients with the hands-on service they know they deserve. This personalized approach provides an environment conducive to the development of new ideas. Accordingly, many improvements and expansions to their niche services have originated from employee suggestions.

“We encourage this out-of-the-box thinking as it

See PURSUIT, page 4



RESOURCES

OPERATING EXPENSES SURVEY Are you overlooking obvious ways to be more profitable? It's always important for firm leaders and financial managers to keep overhead costs in check, and every design and environmental firm has costs that can be cut in one area or another. Where does the fat reside in your firm? Where can you minimize spending to maximize profits? Get the answers to these questions and many more with Zweig Group's 2014-2015 Operating Expenses Survey of Architecture, Engineering, Planning & Environmental Consulting Firms.

Newly updated for 2015, this survey has the latest, most detailed statistics available on operating expenses for firms just like yours. Get data on everything from how much the average firm spends on professional liability insurance to how much it spends on hardware and software.

We packed this report with tables, and broke the data out by firm type, region of headquarters, staff size, growth rate, and client base so you can make apples-to-apples comparisons between the survey statistics and your own firm. We also included trend data so you can compare your firm's spending history to the industry norm.

The 2014-2015 Operating Expenses Survey will show you how to:

- Set your firm's 2015 budgets based on accurate industry benchmarks
- Identify excessive overhead expenses
- Justify budget cuts or increases
- Learn how much money to spend on marketing
- See how much other firms are spending on bonuses, 401(k) plans, and other benefits

■ Get a handle on rent & utility costs for firms of your size and region
For more information or to buy a copy, call 800-466-6275 or log on to <https://zweiggroup.com/p-2217-operating-expenses-survey-2014-2015>.

SUCCESSFUL FIRM SURVEY Even during the recent economic downturn, there are firms in the A/E industry that still report continued growth and increasing profits. How do the most successful architecture, engineering, and environmental consulting firms do business? What are they doing that you're not? Find out with the 2014-2015 Successful Firm Survey of Architecture, Engineering, Planning & Environmental Consulting Firms.

This new publication covers every area of management for leaders of design and environmental firms. Whether you want answers to questions on financial performance, marketing, information technology, project management, compensation, billing practices, or other issues, you'll find it all in this one report. Statistics are shown for the fastest-growing firms and highest-profit firms separately from the overall sample so you can benchmark your firm against the most successful firms in the design and environmental consulting industry.

The Successful Firm Survey is a compilation of all the major management topics covered in 10 of Zweig Group's survey reports conducted throughout 2014. In addition to compiling survey data from other reports, we also broke data down by the overall sample compared to the fastest-growing firms and the most-profitable firms. Whether you're a firm president, CEO, vice president, principal, or division or department director or manager, you're going to want to see these survey results!

For more information or to buy a copy, call 800-466-6275 or log on to <http://zweiggroup.com/p-2210-successful-firm-survey-2014-2015>.

PURSUIT, from page 3

keeps our firm engaged with current industry trends and demands," McGrath says.

CREATING SUSTAINABLE RELATIONSHIPS. Peter Ceribelli, CEO, Apex Companies (San Diego, CA), a 600-plus person environmental engineering firm, says that they are dedicated to developing strong client relationships, which are sustainable for years to come.

"We know that in order to be successful, we must serve our clients better than anyone else. To do this we attract, motivate, and retain the best people in the business, who help us to develop and deliver high quality, cost effective solutions that enhance our clients' bottom line," he says.

This pursuit is through design, as well as an identified client need. Apex's ability to be successful at this for decades has fostered strong client relationships and the high volume of repeat business year after year.

What's driving your firm? ▀

IN BRIEF

ENGINEERING CONFIDENCE The Randstad Engineering Employee Confidence Index, a measure of overall confidence among U.S. engineers, rebounded slightly to 61.7 in the third quarter of 2014, an increase of 1.9 points from 59.8 last quarter. The online survey, conducted by Harris Poll on behalf of Randstad Engineering among 116 employed U.S. engineers (ages 18 and older), continues to indicate high confidence levels for engineers, relative to all other professions tracked, including finance and accounting, office and administrative, engineering and healthcare.

The index also showed more engineers believe there are more jobs available this quarter, with nearly four-in-10 (38 percent) reporting a positive job outlook, a 17 percentage point increase from Q2. In addition, more than half (56 percent) of engineers are confident in their ability to find a new job this quarter compared to 51 percent in the second quarter of 2014. Despite this, the index found only 32 percent of engineers say it is likely they will seek new employment in the next 12 months, representing no change over last quarter.

"Our Engineering Confidence Index continues to illustrate why it's good to be

working in the engineering profession right now and for the foreseeable future," said Richard Zambacca, president of Randstad Engineering. "The fact is, skilled engineers, particularly those in mid-career, are clearly in the driver's seat when it comes to the employment market and the number of available jobs is steadily increasing."

According to TechServe Alliance, on a year-over-year basis, engineering employment has grown by 1.5 percent since September 2013, adding 37,500 engineering workers.

MCGRAW HILL CONSTRUCTION SOLD McGraw Hill Financial announced it has completed the previously disclosed sale of McGraw Hill Construction to Symphony Technology Group. As announced on Sept. 22, 2014, the sale price was \$320 million in cash and the transaction completes the portfolio rationalization to create McGraw Hill Financial.

"Completing this transaction enables us to apply even greater focus and resources toward the ongoing growth of McGraw Hill Financial," said Douglas Peterson, president and CEO of McGraw Hill Financial. "I want to thank the employees of McGraw Hill Construction for their contributions to the company over many years and wish them every success in the future."

BEST FIRM

Meritocracy works for this Best Firm

EKFox also offers a competitive benefits package and a training program that maps each employee's career plan.

By LIISA SULLIVAN
Correspondent

EKFox (Fairfax, VA) placed at no. 15 on Zweig Group's 2104 Best Firms To Work For ranking. A multidiscipline firm of 67 staff members, its mission is to improve the performance of the built environment by bringing engineering rigor, consistent high quality, open minds and cost-effective problem solving to each and every client project.

key strategic focuses: income generation, growth and diversification, communication, and training/recruiting. This includes a revenue goal of 10-15 percent revenue growth per year.

And, EKFox plans to continue providing a stimulating environment and growth culture for staff.

Last year, they promoted three engineers to increasing levels of responsibility and made five promotions in total.



Snapshot of a company bowling outing.

"Our product is our people. Early on, the tone was set that we value our staff as individuals and understand that life is complicated and to get people's best efforts we had to respect and take into account what is going on in their life."

The firm's core value of meritocracy looks to reward outcomes and results, so young engineers with the motivation and performance have the ability to move up quickly and take on more responsibility.

In addition, the company budgets

specific dollars for training and research, and development that enable staff to broaden their skill sets and capabilities outside of the normal day-to-day duties.

"Our creative energies have led to two patent-pending products and one awarded non-provisional patent. We reward the staff who contributed to the patent efforts with spot bonuses. With respect to employee wellbeing, we continue to substantially subsidize the majority of health insurance costs, including medical, dental, vision, disability, and long-term care insurance. In addition, we continue to benefit from low voluntary turnover," Zenjuh says.

MAKING STRIDES. In 2013, EKFox made the following changes/improvements:

- Launched a new career planning effort for the firm. Every employee was given guidance on building a career plan and provided with tools to create such plan, setting near and longer-term objectives, and a skills matrix to delineate the strengths employees will build upon as well as areas of development, including action items and resources/support.
- Added the flexible spending account benefit for

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TALK TO US

Do you have an interesting story to tell? Is your company doing things differently and getting results? Let us know. We'd love to contact you and feature you in an upcoming case study. If interested, please email LSullivan@zweigwhite.com.

Founder Eugene Fox's goal was to bring together that unique perspective to creating effective design solutions together with a sense of responsibility to every staff member of the company. It seems he accomplished what he set off to achieve in April of 1980.

FOCUS ON EMPLOYEES; THEY WILL FOCUS ON CLIENTS. James Zenjuh, vice president for business operations, believes that EKFox was honored with the award because the firm's values and culture are very employee-centric, and that focus on employees enables them to focus on their clients while delivering the best possible product.

"Our repeat clients top 85 percent of our revenue and our employees have lasting and productive relationships with our clients, even as some of our clients move around into different government or commercial roles," Zenjuh says. "We have always strived to have a very competitive benefits package and a training program that maps each employee's career plan to the firm's technical needs."

Zenjuh says that 2013 was a very rewarding year for EKFox. The company had its best year since 2008 and moderate growth continues. A new five-year strategic plan is under development with four



Fix what's wrong quickly

When service or quality problems arise the best policy is to act fast to right the wrongs.

Mark Zweig wrote about how relationships are key to success among AEC firms in the Nov. 3, 2014 issue of **THE ZWEIG LETTER** (#1078). Rick Koehler, chief strategic officer at **Architects Plus** (Cincinnati, OH), an architecture and interior design firm, wrote:

Mark,

I just wanted to tell you that I completely agree with your viewpoint expressed in your article "Relationships key to success." You point out that, "Relationships are critical if you are going to be able to overcome pricing issues or service/quality problems... If all you are is a name and they know nothing about you the slightest problem could become a good reason to dump you."

I'd like to take that idea one step further. Assuming that you have built a good relationship with your customer and now something goes wrong on a project, their trust level with you drops immediately. IF, however, you are 1) quick to respond; and 2) do it without any question about "what's in it for me" (i.e.: don't ask for the extra services agreement first in this instance) my theory is that your stock price soars and in fact you end up in a place that has a higher trust level than if everything had gone smoothly on the project. Sound

crazy?

Think about the Tylenol incident 25-plus years ago. Someone opened one or two bottles in a store in the Midwest and added a toxic substance that later was ingested by one or two individuals. Tylenol immediately pulled all of their products off of all of the shelves across the country until it was determined how this had occurred. This, of course, led to the sealed tops under the caps that we have now, but when Tylenol put their products back on the shelves their customer loyalty had soared because we knew it was safe to again purchase their brand. The same can be said for selling architectural or engineering services. If the proverbial whipped cream hits the fan, get it fixed and do it without any reservation and you will have a customer for life. Just my opinion.

Cheers,

Rick

Mark Zweig responds: "Hi, Rick. Doesn't sound crazy to me at all. I completely agree. Thanks for writing!"

Mark ▀

EKFOX, from page 5

employees to set aside pre-tax dollars to pay for healthcare expenses.

- Incorporated a "capture review process" to more effectively monitor, develop and ultimately win project opportunities. This has been particularly helpful with the government markets due to the number of solicitation steps and potential teaming arrangements. The process includes regular tracking of new opportunities as they are announced or developed and making a "go/no go" decision with predefined criteria that judges are ability to win the project. They meet bi-weekly and review all pursuits.
- Revamped the corporate budgeting process to more clearly show variances at the unit level and assist managers in monitoring and assessing impact on their budgets.
- Revamped several accounting processes to improve the way certain costs are allocated and measured in an effort to improve manager or indirect rates and finish the year closer to targets.

James Moye has been with EXFox for nine years. He took the job right out of college. He says that EKFox gives him the opportunity to work on projects that support various missions at home and abroad that he believes are important

to the welfare of the country.

"The work gives me the opportunity to travel to places that I may not have had the opportunity to visit otherwise," he says. "Both the management and my peers alike appreciate my efforts and care for me as a productive member of the firm."

For senior management, EKFox has always been about its people.

"Our product is our people," Zenjuh says. "Early on, the tone was set that we value our staff as individuals and understand that life is complicated and to get people's best efforts we had to respect and take into account what is going on in their life. This viewpoint has translated over the past few decades into a culture that prioritizes respect for each staff member, which in turn creates respect for each team member, and our clients."

Zenjuh adds that receiving the Best Firm award has simply reaffirmed that they work at a very reputable firm.

"It's even a more powerful message to candidates in that the award conveys a sort of cultural quality control check, if you will, that EKFox has been validated as a great place to work," he says. ▀

RIGHT NOW

Build your brand; they will come

Three firms offer three perspectives on brand-building strategies that have worked for them.

By LIISA SULLIVAN
Correspondent



Jason Mercer,
Chief Marketing
Services Officer,
Morrison-
Maierle, Inc.

A firm's reputation is their brand. And, in the AEC industry, where reputation is often built on what clients think of you, controlling that message can be challenging. Therefore, for many firms, building a better brand equates building better relationships.

STICKING TO CORE VALUES. **Morrison-Maierle, Inc.** (Billings, MT), a 270-person professional services engineering firm that has been around for nearly 70 years, started its branding from the ground up. Founders John Morrison and Joe Maierle took it upon themselves “to pull Montanans out of the mud.”



Karen Wiesneski,
Marketing
Manager, R.A.
Smith National,
Inc.

“Some may wonder if we have revised our brand to meet the changes that have occurred in the last 70 years,” says Jason Mercer, chief marketing services officer. “The answer is really ‘no.’ Our founders’ core values and core purpose continue to resonate with our employee-owners and our clients. Yes, we have made small changes by updating the language to fit with the times, but our most effective brand-building strategies occur when we stick to our core values of integrity, commitment, respect and excellence and let our employee-owners create solutions that build better communities.”

Mercer maintains that the most effective brand-building strategies succeed when you are true to yourself and don't try to be something you aren't.

THE NUTS AND BOLTS OF IT. Morrison-Maierle includes multiple channels and media in their campaign. Mercer says that traditional print media still has a role in branding because there are still decision makers who use print for information, so it has to be part of the overall strategy. He also finds that social media is quick and easy, but more damage can be done with a simple click of the mouse if you have not been diligent in defining your message for those channels.

“First and foremost, you have to have a target audience,” Mercer says. “We are learning that casting a broad net is unproductive.”

It's also important to include your firm's staff in your branding strategy.

“They are the best messengers for your brand. Educating them on the ‘why’ for your campaign only helps them to carry out the message to clients,” Mercer says.

“In the professional services industry, your brand is based on your reputation.”

Karen Wiesneski, marketing manager, **R.A. Smith National, Inc.** (Brookfield, WI) a 170-person, multidisciplinary civil engineering firm, agrees that it's essential that everyone understands and communicates the same message – whether the message is related to a particular service offered or a corporate position on an industry issue.

R.A. Smith National uses several strategies to effectively build their brand that include:

- Blog writing
- Videos
- Publishing articles in trade publications
- Social media

Many of R.A.'s employees are active on LinkedIn and serve as brand ambassadors for the firm. In 2015, they plan to reach out to key organizations in the industry as well as in-house experts to take its content marketing program to a new level.

Another key strategy to building R.A.'s brand has been developing a work environment that attracts the best and brightest talent.

“As a result, we have had the opportunity to promote the numerous awards we have received as a best place to work in southeast Wisconsin and nationwide,” Wiesneski says.

Maggie Jones, marketing coordinator, **BLUELINE** (Kirkland, WA), a 32-person land development

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On the topic of surveys

The gray areas, the nuances, and the reasoning behind them.



Marilynn Mendell

GUEST SPEAKER

The other day I lost a client to a competitor. It happens. Many excellent shops exist. What triggered the idea for this article came about for another reason. The prospective client said the other consultant intended to survey 30 of his clients before doing anything else. Anyone out there see something terribly wrong with that? Hold that thought.

Surveys serve many purposes. Their timing, like so many other things in life and business, must be factored into the equation. It can take months for an outside consulting firm to get to know a company, their projects, and gain their fundamental desired outcomes for the entire effort.

Surveys hold the potential to be effective sales tools. Surveys need to match or be aligned with firm marketing goals and strategic plans. Great survey questions get created by both the consultant and the client. Anyone can write questions and cold call total strangers on your behalf (saving you, the introvert, the horrible task of reaching out and actually speaking with someone). However, not everyone can turn a survey call into an opportunity for future growth, for brand reinforcement, to discover holes in the fabric of your marketing efforts. The personalized touch of an in-house well informed and trained questioner far exceeds a total stranger's approach.

Don't be fooled by the third party routine either – "People will tell us more than you." Really? Would you? I'd take a call from my friendly ConstantContact technician because I know and like her. I'd be happy to give valued vendors feedback on what they could improve.

Being able to touch your best clients at the principal level gives outside consultants one other important thing: Direct access (with your recommendation) to future clients for them. And let's say you really do want to hand off the task to someone else. My final argument for "don't do that" is that every market is – here's a word I don't use often – unique. D.C. is different from Billings, Mont., which is different from Boston. Someone who works with toothpaste manufacturers may not understand the real estate market. A notable exception would be Palo Alto, Calif.-based design thinking firm **IDEO**, and they do a boatload of research before playing around in waters they haven't walked across. Great outside consultants obviously have high ethical values, good intentions, and they work closely with clients to

Fundamentally, a survey must provide more than a gut check. It's a marketing and sales opportunity, and it takes a great deal of planning and subtlety to be able to steer the client in the direction intended.

ensure the widest range of positive outcomes. I'm just making a point for any survey to be a well-thought-out team effort.

In the long run, the bottom line increase and advantages generated by a long range plan of carefully conceived objectives will be enormous and you won't wake up in a year and feel as though you just threw money down a rat hole. With or without a consultant, an in-house survey of your employees always comes first. To be able to sell a company properly the principals and the greater body of the employees must be in alignment with corporate goals and values. If not, then work needs to happen to illuminate corporate direction and cement correct concepts in everyone associated with your firm before speaking with XYZ's clients. That's why strategic planning in-house comes before anyone reaches out to clients. If you don't already have plans in place, or annual review of strategic plans, you're not alone. Few companies regularly lay out corporate directions, utilize marketing plans, or take the internal corporate pulse annually. Start now. Work as an internal committee or with an outside consultant

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Build a competitive marketing department

Using industry benchmarks can help you invest with confidence.



Chad
Clinehens

Have asked yourself how many marketing staff members your firm should really have? Firm leaders often ask us this because they are constantly hearing how they should be investing more in marketing. Say the words “marketing investment” and many things can come to mind: Marketing staff, computers, software, printers, business developers, golf sponsorships, conference booths, advertisements – and the list goes on.

BRAND BUILDING

Having a good marketing department is the first step in getting the most out of your numerous marketing expenditures. You need enough people *and* the right kind of expertise to earn a decent return on your marketing investment. For firm leaders or marketing professionals looking for guidance on what a marketing team should look like, benchmark data can help you invest with confidence.

- 1) Have enough marketing people to adequately support your technical staff.** Firms often subconsciously believe that all overhead is bad; therefore we should have as few marketing staff as possible. Having adequate marketing support resources can actually free up your billable staff to focus more on projects and therefore make more money for the firm. Having the adequate number of quality marketing team members handle more marketing tasks at lower hourly rates is preferable to using your technical professional staff. Firms in this industry have a ratio of total staff to marketing staff of 26:1, according to Zweig Group’s 2014 Marketing Survey.
- 2) Have the right expertise for your firm.** The larger firms are, the more varied the expertise they have in-house. Firms often add a marketing director once they reach 25 employees. Once a firm surpasses 250 people, they tend to have one marketing director, two marketing managers, four marketing coordinators, two public relations and communications specialists, one graphic designer and one web designer. For firms to compete in this market, their marketing departments need to be staffed with the expertise that will help them stand out from the competition.
- 3) Have your marketing effort reflect your vision and mission.** Industry benchmarks are great for offering a basic sense of what the market is doing, but to truly stand out, your investments must empower your strategic plan. For example, the average 2014

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marketing budget as a percentage of net service revenue was 1.6 percent for stable growth firms versus 3.4 percent for growth firms, according to the 2014 Marketing Survey. Firms growing 20 percent or more for the past three years are therefore spending over twice as much in marketing. That clearly demonstrates that fast growth firms believe and invest more heavily in marketing. If your strategic plan includes an aggressive growth plan, a preemptive investment in marketing staff is likely necessary to enable a scalable organization. A clearly distinguished vision and mission is greatly enhanced by strong marketing!

Being armed with industry data can provide a good starting point for where and how much you need to invest in marketing. Additionally, the data supports a powerful argument when you need to get other firm leaders on board with what may be a significant investment in marketing. Knowing what other firms are spending in marketing is a good way to benchmark your investment. As we have said it many times: The margin between winner and loser in our industry is often painfully small. Anything you can do to outsmart, outspend and outperform your competition can make the difference in being a stable firm versus a high growth firm! ▀

More information about Zweig Group’s 2014 Marketing Survey of Architecture, Engineering, Planning & Environmental Consulting Firms can be found at <https://zweiggroup.com/p-2205-marketing-survey-2014>.

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to get future plans on paper.

Internal surveys: begin at the top. Question the principals first. Whoever conducts surveys must be well versed in open-ended questions (the ones that don't illicit yes/no answers). Consider these: Describe the firm's differentiators. Explain the company's culture. How does leadership work here? Explain your future career plans? What could be made better here? Then ask the same questions of everyone else in the firm, including the CFO and the receptionist. Analyzing those results can be enlightening to everyone. Why? Because surveys provide fantastic opportunities. HUGE. How do you expect your clients to know who you are, what you do, or explain your differentiators if you can't or if only a few of you can succinctly mouth the answers. And then, worse, if a client says, "Well, XYZ just does interiors." An embedded consultant or an in-house knowledgeable employee can say, "Oh, they also do mixed use and a bulk of their work comes from prison designs." Or, what if the answer from an outside client is prisons and you had made a concerted effort to change course three years ago to K-12 schools? Someone with expertise can instantly clarify that conversation. It could go several ways and decisions on those strategic directions should have been made prior to any survey calls. That's why it's important to figure out what you want to gain from the survey from the start. Try to convince old clients to work with you in another market sector as well as where they currently hire you for? Or perhaps convince them that measures have been taken to improve customer service. If XYZ says, "We want better customer service," then an interviewer can explain that the project manager has been replaced and new paths have been implemented to provide those needs. Maybe there are clients that shouldn't be contacted because they only finance prison development and XYZ has switched to designing K-12. Being out in front of customer desires, along with the ability to know when to interject those thoughts, takes finesse. Henry Ford once said, "If I had asked people what they wanted, they would have said faster horses." Or maybe better buggy whips.

If a survey isn't an opportunity, then what is it for? What do you want/expect to hear? Are you liked? Are you still making good quality buggy whips? Do you provide excellent customer service? If you plan to remain in buggy whip manufacturing, then you need specifics. How does the handle feel? Would you like to try our new imported leather from Portugal?

When do you design the new corporate look, website and collateral materials? Before the survey. So that it rolls out just before the actual survey. Then when the individual conducting the survey talks about the company's new and improve whatever, clients can SEE for themselves.

Going back to the prison example: If you're not designing them anymore, then remove them from sight. If everyone thinks that's all the company does, when it has been designing schools for the past three years, then there's a major disconnect and you should plan for some marketing expenditures to advertise your new direction. Most of the time, clients who do interior work with your firm associate what you do as only interiors, base building folks think

base building, and so on.

Occasionally you get outliers who volunteer something like, "You never called me before using me as a reference and I hate that." Or I've had clients say, "You never asked for the job or thanked us after completion." Rare comments like these prove most useful. The hard questions can usually only get pulled out of past clients over a game of golf, a quiet lunch, or something else relaxed in nature. If it's important to find out why your client went to a competitor, then I would suggest that those delicate questions need to be privately conducted and in a positive environment, conducive to revealing touchy answers.

Fundamentally, a survey must provide more than a gut check. It's a marketing and sales opportunity, and it takes a great deal of planning and subtlety to be able to steer the client in the direction intended. If not carefully orchestrated, the answers will come back as expected, the client may not discover your new area of expertise, and worse, it could be perceived as amateurish and leave a bad taste with your client. Surveys require hard thinking, plans, and the right person in charge who thoroughly grasps the importance and entirety of your goals and expectations. ■

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AWARD WINNERS

PFAEHLER INDUCTED TO LAI Gretchen Pfaehler, director of historic preservation at **Michael Baker International** (Pittsburgh, PA), a 5,000-person engineering, development, intelligence and technology solutions firm, has been inducted as a member of the George Washington Chapter of Lambda Alpha International Class of 2015. Pfaehler's induction showcases the company's range of capabilities and reaffirms her commitment and its dedication to making a difference through support of organizations that preserve or better utilize the world's resources.

The George Washington LAI is comprised of by-invitation-only professionals in the Washington metropolitan region who have been recognized for their achievements in a land economics field over a period of not less than 10 years and for their demonstrated commitment to community service outside of their professional endeavors. LAI has chapters in multiple key cities in the United States, Canada, England, and Spain, with members-at large in various parts of the world.

Pfaehler's participation will support LAI's purposes: to honor men and women in all parts of the world whose achievements have contributed to the advancement of the science of land economics; to encourage the study of land economics and support the highest ideals of scholarship and integrity; to expand the world's knowledge and understanding of the principles of land economics; to take action on ideas which contribute to the enrichment of our urban and rural environments; and advance a close-working bond and mutual understanding among men and women engaged in all disciplines of land economics.

Pfaehler has over 20 years of experience in the preservation, restoration, and renovation of historic buildings and landscapes across the U.S.

PORTFOLIO

Cardno connects new employees

Global Knowledge Management system eases integration of team members from newly acquired companies.

Stay connected.
Build a better Cardno

Fill out your profile.
Connect to more Cardno colleagues

Global KM
01
days

Cardno

By CHRISTINA ZWEIG
Contributing editor

Beginning in 2007, **Cardno Americas Region** (Portland, OR) experienced rapid growth through mergers and acquisitions. Many of the acquired firms were still operating on the systems they had in place before joining the North American arm of Australian-based professional infrastructure and environmental services company, thus connecting the increasing staff became an incredible challenge. Cardno realized staff needed to have an easy and efficient method to find and communicate with each other so they could pursue mutually beneficial clients and achieve the revenue synergies expected with the acquisitions.

Cardno's response to that challenge, the Global Knowledge Management system, recently won second place in the internal marketing category of the 2014 Marketing Excellence Awards.

DEVELOPMENT. Cardno America's Corporate Marketing & Communications team began preparing for the rollout of the Global Knowledge Management system over six months ahead of the actual onboarding process.

Six months before launch, the 5,000-person firm established "stakeholder champions." Because each acquisition still essentially operated as a separate entity, Cardno knew they needed champions in

each acquisition who were committed to the project's success and had the ability to help address acquisition-specific concerns. For each of the 11 U.S. acquisitions, the firm identified both a technical and marketing champion. These Global KM Champions were kept up to speed with regular calls and email with the team and abreast of the assembly of key marketing materials, such as employee headshots and résumés.

"Our goal was to have them as invested in the outcome as we were while proactively addressing the issues," says Zeel Patel, VP of marketing and communications.

Three months from launch, Cardno focused on IT and HR alignment, and worked closely with IT teams to ensure the proposed solution would work.

Six weeks from launch, Cardno worked to garner support from mid-level leaders. "We wanted mid-level leaders to experience the ease of entering their profile and benefits of being able to have people quickly find them so they would also support the efforts of the KM champions," Patel says.

would anyone recognize you?

send your profile in for review
Click "send profile" to email your manager and have them approve

Fill out your profile.
Connect to more Cardno colleagues

Global KM
10
days

Cardno

A great opportunity for this arose through the internal regional conference where 70 key mid-level managers were in attendance. A booth at the conference contained three laptops where managers could come to enter their profiles. Key presentations and messages throughout the conference also focused on having people complete profiles and the senior executive team openly encouraged completion. Within two days of the conference, over 80 percent of attendees had completed their profiles.

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consulting group, reveals that they do not have a formal brand-building strategy in place. They have found that the most effective way to build their image is to put their employees first, and invest in their professional development.

“This growth enables a sense of ownership and pride in our work, and a personal interest in our success,” Jones says. “That passion is then recognized by our clients, enhancing our reputation and strengthening our image.”

BLUELINE’s internal culture is based on the philosophy “work hard, play hard,” and so they put on company events like poker tournaments, beer tastings, and mini-golf excursions.

“We want our clients to recognize that culture in BLUELINE too, so sponsoring golf tournaments, supporting local events, and volunteering within our community allows our clients to get to know us outside of the office in a more natural setting,” Jones says.

IS BRAND BUILDING DIFFERENT FOR A/E FIRMS THAN FOR OTHER INDUSTRIES? Mercer believes that brand building is much harder for A/E firms than for other industries. The primary reason is that brands in the A/E industry are based on relationships and people.

“In the professional services industry, your brand is based

on your reputation,” he says. “And, your reputation is controlled by clients who speak about your firm to others. Do they give you high marks for your 15-year relationship or do they just remember that one project that did not go so well because someone caught them on a bad day? You have to be diligent about monitoring your reputation in the market and act quickly to resolve issues with clients.”

Jones agrees with Mercer in that brand building is different for A/E firms.

“When comparing a service/consultant firm to a business that sells a product, the clientele has different expectations of each company,” she says. “Service/consultant firms must develop a relationship with their clients, and design a solution that solves a unique problem, building a lasting and trusting relationship.”

Wiesneski feels a bit differently than Mercer and Jones. She says that brand building is very similar to other industries because it all comes down to identifying your company’s greatest strengths and creating brand awareness of the key differentiators of your product or service.

“While the tactics may be different, every company should take the opportunity to creatively promote their brand to their target audience,” she says. “Firms should review what their competition is doing, explore what companies outside of their industry are doing and network with other marketing communications professionals to gain new ideas.”

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Cardno launched an exhaustive onboarding campaign – Twenty Days to Connect Cardno. The firm developed an overall theme for the campaign to focus on the project’s benefits (connecting people) and create a timeline within which people needed to act. The time length reflected the 20 business days for the companywide launch.

“We decided to take a light-hearted approach that added humor from mainstream media into each email communication while delivering critical information. Through this approach, we found that employees read and looked forward to our daily emails. Each email also included any relevant updates for employees, as well as tips and tricks on how to complete their profiles,” Patel says.

The email campaign used humor and often contained spoofs on contemporary culture and popular Internet memes. To further increase employee interaction, Cardno developed a competition where staff competed for a \$500 Amazon gift card. Employees were divided into 10 teams with approximately the same number of people from different acquisitions.

The teams that achieved 90 percent of all team members completing their profiles by day 20 were eligible to win the \$500 Amazon gift amazon gift card prize.

To further drive profile completion, all employees across the Americas Region who had their profiles at 100 percent complete were entered into a separate drawing for airline tickets. ■

GLOBAL KM GOALS

To address the challenges of a rapidly growing company with ongoing acquisitions, diverse technical expertise and segmented systems, the Global Corporate team decided to implement a Global Knowledge Management (Global KM) system.

This SharePoint based system involved each employee having their own profile with basic contact details, a headshot photo, profile summary, industry experience, skills, country and language proficiency levels, as well as résumé attachments. Basic contact details were pre-populated through IT and HR systems, but the rest of the profile needed to be filled out by each employee.

Although the system would be deployed globally, it was the responsibility of each of three regions to onboard staff in their region to fill out the details. Since the system is only beneficial of the majority of staff filled out their profiles, the measure of success was how many employees filled in their profiles to 100 percent completion rate during the onboarding campaign. In addition, the regional corporate goal was to have at least 80 percent of staff complete their entire profile.

The core audience was full-time office professional in the U.S. (2,500 staff).

Communication channels were email and intranet. The program sent out daily email reminders to compel people to complete their profiles. Cardno was especially cognizant of using an approach that wouldn’t create an issue where employees would start deleting or ignoring emails. Because the project had such high visibility, they didn’t want to provide a reason for employees to actively dislike corporate communications.

RESULTS

At the end of the campaign, Cardno had an 87.64 percent completion rate for full-time professional staff across the region, surpassing the 80 percent goal. In addition, seven teams ultimately achieved competition goals and their employees were entered into the drawing for the \$500 Amazon gift cards. Profile completion data was captured through the automated internal reporting system.