:: SMPS SOUTHWEST REGIONAL CONFERENCE 2010 ::

Become Your Firm's Marketing Leader

:: Useful Training Sessions To Increase Collaboration In Your Firm ::

MARKETLINK
A Marketing Guidance Company for the A-E-C Industry

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NOTES

Overview of Session

- Tools for in-house marketing sessions
- 6 session outlines on important topics
- Challenges of training sessions

Training Session Planning

- Brown bag format – 1 hour/once a month (or more depending on your needs)
- Offer credits/University
- Technical, marketing and administrative staff
- Audience may change depending on topic
- Getting buy-in from management
- Principal involvement and attendance
- Can be done in any order depending on needs within your office
- Make them interactive… not a lecture series
- This information can be used for your marketing plan

6 Key Topics for Increased Collaboration

1. Presentations/Public Speaking
2. Business Development
3. Client Relations
4. Client Association Involvement
5. Networking
6. Proposal Writing

How this Workbook is Compiled

- Session topic
- Involvement Activities
- Tips & Tricks : these can be used as your teaching topics, hand-out ideas, etc. This is your resource for information.

Techniques To Creating Chemistry In Interviews

NOTES

Why is public speaking and presentation training important?

Involvement Activities

- Develop elevator speech
- Develop impromptu topic
- Conduct 15 minutes interviews and video tape
- Presentation planning worksheets
- Question and answer brainstorming

Tips & Tricks for Your Brown Bag Presentation

- Physical appearance
- Gestures
- Articulation
- Preparation
- What undermines your presentation?
- Asking the client crucial questions about the interview
- Reviewing all research to date with entire project team
- Presentation mechanics and visual aid tips
- Project approach is the name of the game

Involvement Activity - Develop Elevator Speech

NOTES

What Is An "Elevator Speech"?
An "Elevator Pitch" is a concise, carefully planned, and well-practiced description about your company that your mother should be able to understand in the time it would take to ride up an elevator.

What an "Elevator Speech" is not:
It is not a "sales pitch." Don't get caught up in using the entire pitch to tell the Investor how great your product or service is.

Creating The "Elevator Pitch"
Five questions your "Elevator Pitch" must answer:

- What is your service? Briefly describe what it is you do and what the company does. Do not go into excruciating detail.
- Who is your market? Briefly discuss who you are selling the service to. What industry is it? How large of a market do they represent?
- Who is behind the company? "Bet on the jockey, not the horse" is a familiar saying among Investors. Tell them a little about you and your team's background and achievements. If you have a strong advisory board, tell them who they are and what they have accomplished.
- Who is your competition? Don't have any? Think again. Briefly discuss who they are and what they have accomplished. Successful competition is an advantage-they are proof your business model and/or concept work.
- What is your competitive advantage? Simply being in an industry with successful competitors is not enough. You need to effectively communicate how your company is different and why you have an advantage over the competition.

Involvement Activity - Planning Presentation Worksheets

Planning Your Presentation
Create a table for each section naming the speaker, what the content will include, who is assigned to provide content and what the visual aid will be during the presentation.

- Introduction
- Key issues
- Team
- Experience
- Project approach
- Why choose us?

SPEAKER	CONTENT	ASSIGNMENT	VISUAL AID

Involvement Activity - Brainstorm Q&A

NOTES

Question and Answer Session
Hold a brainstorming session of potential questions with others in your office. Plan who will address what types of questions Anything you don't want to be asked... will be. Be prepared for the worst! Have the assigned Project Manager facilitate the questions. Keep this list of questions as boilerplate. Brainstorm questions you can ask them if you feel the conversation slacking. Anticipate Q&A with boards/slides. See the following pages for worksheet.

POSSIBLE QUESTION	WHO	ANSWER

Other Involvement Activities

NOTES

Develop an Impromptu Topic

A good way to have your technical staff practice public speaking that is fun and entertaining can be used as follows:

Have everyone in the group write a topic such as:

- *Describe your last vacation*
- *Explain why you chose your profession*
- *Describe your favorite characteristics of your mother-in-law*
- *What was your best college experience*
- *Tell the story of your most embarrassing moment*

Put the topics in a jar and have each person draw and immediately go to the front of the room to speak for 3 minutes on their topic using proper public speaking techniques and organization. Continue so everyone has a turn. Hold these sessions quarterly so everyone can stay sharp and able to think on their feet. Make it fun!

Videotape/Peer Review

Everyone can benefit from seeing and hearing themselves speak via videotape. Even the most seasoned management staff can use every opportunity to perfect their skills.

Ideas for organization of this involvement activity include:

- Break technical staff into groups of 3-4 depending on size of staff.
- Give the group a proposal/RFP from a previous project pursuit effort. Or, have the group use presentation materials that you have from a previous interview.
- Each group must put together/recreate the interview each using 5-7 minutes of speaking time.
- Videotape each presentation.
- Once completed, watch the presentations back and have the entire group give constructive feedback.

Tips & Tricks for Creating Your Brown Bag Presentation

NOTES

Communication is NOT what you say, or thought you said. It's what THEY hear and what THEY think you meant.

Therefore: Communication is NOT intent, it is perception. And perception equals reality.

Guidelines for Public Speaking

- Be relaxed and be yourself
- Avoid a podium – become friendly with the committee
- Use good posture and gestures that are inviting and comfortable
- Maintain eye contact
- Project your voice
- Practice with audio and visual equipment
- Body language
- Pitch of voice
- Speed of voice
- Tone
- Fillers
- Avoid Speech Fright
- Avoid caffeine
- Avoid milk products (coats vocal chords)
- Drink lots of water to avoid dry mouth
- Breathe deeply and calmly
- Exercise the day of a presentation to burn up adrenaline

Do's and Dont's

Do

- Let people remain the centerpiece of the presentation
- Give the audience time to understand the visuals
- Hit the high points
- Be yourself

Don't

- Overdo/Overload
- Split your audience's attention (leave behinds)
- Talk to your visual aids
- "Hide" behind your visual aids
- Read from a script
- Under or over dress

Tips & Tricks for Creating Your Brown Bag Presentation

NOTES

#1 Power Tool in a Presentation: EYE CONTACT
#2 Power Tool in a Presentation: YOUR VOICE

Eye Contact

- Scan, pause, move on
- It is best to make critical points while looking at the key decision maker
- Use variety in your voice
- Move around the room to keep the audience interacting with you

Opening Statement

- You are immediately "On" from the second they audience sees you. They are making judgments about you even before you start.
- Make eye contact, smile, and shake hands
- What to say next:
- Give a purpose statement that is powerful. "I'm here to talk about your project/pain". Direct your statements to their needs not general statements about our company/projects.
- The audience wants to know what is in it for them and why they should listen to you.

Purpose Statement

- Must be client-oriented
- Must be value-based (save time, money, improving image)
- Make sure you are addressing the pain/issues of audience.

Closing Statement

- Make sure you remind audience of purpose
- Reiterate main ideas
- Always say THANK YOU
- You want to close with an action Item, with sensitive body language....don't be cocky.

Tips & Tricks for Creating Your Brown Bag Presentation

NOTES

SMARTA (Your Action Item)

S – Specific
M – Measurable
A – Achievable
R – Reasonable
T – Time bound, must have deadline, closure
A – Assigned + who's going to do it

- Use this to show them you want the job. This can be a way to ask for the job, or give them specifics on when you will be calling to get a decision and to make sure they know you will be checking with them regarding this job.

- After this make sure to thank the audience and end the presentation. Do not continue to ramble on and waste their time.

- If your presentation in running out of time skip to the close of the presentation. They already know you are qualified or you would not be presenting. Get to the part where you make sure they know you want the job/ask for the job.

Critical "First Impressions"
10 Judgments in 10 seconds

- :01 Social Position
- :02 Education Level
- :03 Economic Level
- :04 Social Heritage
- :05 Educational Heritage
- :06 Economic Heritage
- :07 Trustworthiness
- :08 Level of Sophistication
- :09 Successfulness – Previous and Current
- :10 Moral Character

Tips & Tricks for Your Brown Bag Presentation

NOTES

"When you know your customers, some of their special interests or characteristics, you always have a reason to contact them."

-Harvey Mackay, "How To Swim With The Sharks Without Being Eaten Alive"

Presentation Format Guidelines

- How sophisticated is your audience?
- Build up an excitement related to subject matter – end on a high note
- Determine your format:
  - formal vs. informal
  - lecture vs. interactive
  - Powerpoint, boards, slides, etc.
  - large scale vs. small scale projects

Visual Aids

- Props are meant to support speaker, not be a script
- Could you make your presentation and win without your visual aids?
- Know your subject
- Give the audience time to understand the visuals
- Focus visuals around a theme
- Be careful not to split your audience's focus
- Remember, you will win because of what you say (content) not the visual aids

Presentation Skills

- Chemistry is a deciding factor
- Your comfort level as a presenter is key to a smooth delivery
- Seamless, organized delivery amongst your team is essential
- Clearly deliver the message your audience wants to hear
- Use selection committee names whenever possible
- People are the centerpiece of the presentation
- Remember, even if you're not a perfect presenter, you'll likely win if you hit the committee's hot buttons

Rehearsals

- Rehearsals are mandatory
- You are less likely to win if you don't rehearse
- Minimum of two and as many as four
- Allow time for individual practice sessions
- Don't let rehearsals turn into strategy and planning sessions

Tips & Tricks for Your Brown Bag Presentation

NOTES

Audience Questions

- Make sure they know that the audience can ask questions during the presentation, this allows for more interaction. If they say no to this, you will have to wait to verbally interact during Q & A.
- You do not want to get to Q & A and the audience does not have any questions for you. One trick is to prepare six or more questions you anticipate they would ask. If they have no questions, tell them you prepared answers to these certain questions and start with them.

Answering Straightforward Questions

- Listen, understand, clarify, restate...this shows you understand
- ANSWER THE QUESTION – Right away
- Don't know the answer? Tell them
- After answering the question confirm that you have answered it for them

Answering Challenging Questions

- Physically stand firm or step forward (never backward)
- Listen, empathize with them, clarify question
- Don't back out or be defensive
- If someone has bad mouthed your previous work, explain the situation without blaming others
- All they want to hear is that you understand their particular needs for their pain/project and can help them

Tips & Tricks for Your Brown Bag Presentation

NOTES

Create a Winning Outline

- Intro/Welcome - 2 minutes
  - Do not introduce team members
  - Thank you – happy to be here
  - In the next 30 minutes we would like to address the key issues and spend time discussing your project
- Key Issues - 5 minutes
  - 1 Board and/or powerpoint presentation with 5-7 bullets
  - Statements of what is essential to making the project a success
  - You MUST know client issues to make this an important part of your presentation
- Team - 5 minutes
  - Organization chart
  - Team structure
  - Why did you select team members
  - How to work together with the client
  - Arrows pointing both ways
- Experience - 5 minutes
  - Collage or series
  - or individual pages with one to a page (not more than 5 or 6 VERY relevant)
- Project Approach - 25 minutes
  - Bulk of presentation
  - Incorporate key issues – site photos, renderings, master plan issues, etc.
  - What will you do for the client?
  - Why are you different from the competition?
  - Management plan
  - Risk and mitigations
  - Schedule
- Why Choose Us? - 3 minutes
  - Advantage your firm with provide the client
  - Benefit exercise
  - Think strategic! What will you provide that your competitors will not?

Finding & Creating Individual Project and Client Pursuits

NOTES

"If you don't know where you're going, any road will take you there and it's usually not where you wanted to end up."
- Earl Nightingale

What is strategic marketing for specific projects/clients?

How do you find new leads?

Involvement Activities

- Create a plan for a specific project and/or client pursuit
- Brainstorm ideas for client interaction
- Lead finding activity
- Conduct personal marketing evaluation
- Create information gathering questions (See Tradeshows Worksheet)
- Create a business development plan
- BD… Live!

Tips & Tricks for Creating Your Brown Bag Presentation

- Positioning based on a marketing plan
- How to find new leads – 5 best lead sources
- What is rainmaking?

Involvement Activity - Create Plan for Project/Client Pursuit

project/client pursuit 1 :: Client/project name

Expected Outcome: what is your goal? Person Responsible: name

TACTIC	PERSON RESPONSIBLE	DUE DATE	COMPLETE?
		start: complete:	
		start: complete:	
		start: complete:	
		start: complete:	
		start: complete:	

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Involvement Activity - Brainstorm Ideas for Client Interaction

NOTES

- ☐ Advertising
- ☐ Appreciation Dinner
- ☐ Articles in Professional Publications
- ☐ Awards Programs
- ☐ Brochure / Project Pages / Case Histories
- ☐ Business Development Appts w/ Prospects
- ☐ Client Perception Survey
- ☐ Client Presentations (lunchtime, after-hours etc.)
- ☐ Client Relations Program
- ☐ Conference Participation (papers or speeches)
- ☐ Client Testimonials
- ☐ Database (clients, prospects, proposals, hit rate, etc.)
- ☐ Direct Mail (letters, postcards, newsletters, etc.)
- ☐ Focus Groups
- ☐ Marketing Files (read/write privileges)
- ☐ Marketing Plan
- ☐ Market Research
- ☐ Marketing Training (internal and external)
- ☐ Marketing Budget
- ☐ Press Releases / Media Relations
- ☐ Professional Org. Involvement (committees, meeting attendance, etc.)
- ☐ Professional Sponsorships
- ☐ Social / Sport Events
- ☐ Social Media (LinkedIn, Facebook, Twitter, etc.)
- ☐ Special Events (dinners, open house, topping off party, etc.)
- ☐ Trade Show Exhibits
- ☐ Website

Involvement Activity - Lead Finding Activity

NOTES

Identifying New Project Opportunities
Obtain a copy of each major news publication within your target geographic areas. How many articles can you locate that provide your firm with a new project lead? The key word in identifying new opportunities is change—which means there is probably a potential project.

- Growth means the need for more facilities
- Consolidation means something must be done with existing or vacated facilities
- Abandonment means reuse of an existing facility or conversion to a new use

Reviewing newspaper publications should be part of every firm's marketing activities on a daily basis. This is an excellent market research task for administrative staff members to be responsible for and execute.

Application
Have newspapers available to review for leads from each different office. Each group needs to find leads in the paper.

What are the areas discussed today that you feel need personal improvement? What are the steps you need to implement to revise and/or improve your marketing role?

Involvement Activity - Marketing Evaluation

NOTES

Rainmakers have the following traits (according to research conducted by Ford Harding) - Have each participant fill out the following worksheet for personal evaluation.

- **Productive on existing projects**

  - Developed a strong experience base early in career

  - Independent experience in which they could work directly with clients and were eager to demonstrate an ability to manage client relationships.

  - Earned client confidence

- **Interested in marketing early in their career**

  - Found ways to assist in the marketing efforts

- **Kept on top of credentials**

  - Updated credentials often

  - Earning degrees

  - Joining and participating on Boards/Associations/ Committees

  - Published

  - Speaking at a conference

- **Found ways to improve the firm's services**

  - Sensitive to client needs

  - Interested in making clients happy

  - Responded to client concerns

  - Looking out for firm's best interest (ways to streamline production, costs, increase revenues and increase service)

- **They became specialists**

  - They were selected to work on projects requiring their specialty because they were easy to market

  - This increased their knowledge

  - Gained selling and marketing opportunities because they were involved in the process

  - Didn't resist becoming a specialist

Involvement Activity - Marketing Evaluation

PERSONAL MARKETING EVALUATION

Area of Expertise:

Target Market: Who would be interested in this area? Note types of clients, others in the firm, outside business contacts, etc.

Expertise: What proof do you have that you are an expert? Include degrees, certifications, number of past clients in the area, publications, memberships, speaking platforms, testimonial letters, etc.

Knowledge: What specialized knowledge do you have as a result of your experience? Is there anything that differentiates your knowledge from that of others with similar experience?

Experience: What experience do you have on which knowledge can be based? Include client work, previous employments, and any other appropriate experience.

Skills: What specialized skills do you have of value to the market? Include both technical and process skills.

Involvement Activity - Create a Business Development Plan

BUSINESS DEVELOPMENT POSITIONING CHECKLIST

Project: ____ Client: ________________

Done?	Positioning Activity	Assignment	Due Date	Notes

Positioning Activity Checklist

- Identify/meet with decision makers
- Review selection process with client
- Identify selection criteria/
- Review approval process with agencies
- Review project/client information
  - brochure
  - website
  - annual report
  - master plans
  - capital improvement plans
  - feasibility studies
  - program documents
  - funding applications, etc.
- Identify key project issues
- Visit the site and take photos
- Interview the client's past consultants
- Conduct a mini Client Perception Survey (if an existing client)
- Review estimated fee with client
- Invite to your office
- Hold a round table session with users
- Develop a PR campaign that specifically target client
- Identify/meet influencers

#2: BUSINESS DEVELOPMENT & LEAD FINDING CONTINUED...

FIRM NAME - BUSINESS DEVELOPMENT SUMMARY						
CURRENT STATUS BY CLIENT						
HOT		WARM		COLD		DROPPED
(strong relationship w/ client - possible proj identified)		(met w/ client, no proj id'd or but potential work)		(still working on getting in to client)		

Involvement Activity - BD Phone Call

NOTES

It's BD... Live

As a group of technical professionals, create a list of 3-4 projects and/or clients you would like to investigate. Each person picks a client to call and make a business development inquiry on speaker phone. Ask your group's prepared questions.

- Use the Prospect Call Checklist form for general inquiry into a client entity.
- Use the Project Research Worksheet when there is a project and/or lead that you discover. Ask questions according to this sheet.
- Use the Hot/Warm/Cold/Drop sheet to track your efforts.

PROSPECT CALL CHECKLIST

CONTACT NAME: ____

COMPANY / AGENCY: _______________________________________

DATE: _________________________

1. WHAT ARE SOME OF YOUR KEY PROJECTS BEING PLANNED FOR CURRENTLY?

2. WHO IN YOUR ORGANIZATION MAKES THE HIRING DECISIONS?

3. WHICH FIRMS DO YOU USE IN OUR SPECIALTY AND WHY?

4. WHAT ARE THE 3 MOST IMPORT CRITERIA IN SELECTING CONSULTANTS?

    1.

    2.

    3.

5. WHAT IS MOST IMPORTANT TO YOU IN WORKING WITH A DESIGN FIRM?

6. HOW DO WE CONFIRM WE'RE ON YOUR CURRENT LIST FOR RECEIVING RFP'S?

7. INTRODUCE FIRM.

PROJECT RESEARCH WORKSHEET	
Date	
Project	
Agency / Company	
Contact / Phone	
PROJECT INFO	
Construction Budget?	
Project Delivery Method?	*D/B - Traditional - Bridging - Other*
Project Site / Location?	
Funding Source? Funded?	
Specific Mission / Purpose of Project?	
3 Most Important Issues of Project?	1
	2
	3
TEAM INFO	
Firms Who've Done Preliminary Work or Consulted on Project?	
In-house Services Being Provided on Project? If so, what?	
Consultants Regularly Work With?	
Hire Engrs Directly or Only Thru Archl Firms?	
SELECTION INFO	
Selection Process?	
Selection Schedule?	
Selection Committee?	
RFP Meeting? If so, when?	
Copy of RFP Meeting Attendees / RFP Holders Available?	
3 Most Important Criteria in Selecting Consultants?	1
	2
	3
RFP Questions?	*see RFP*

BUSINESS DEVELOPMENT CONTACT UPDATE					
CLIENT:		DATE:			
COMPANY	CONTACT	KNOW US?	WORK W/ US?	NEXT STEP / WHO?	NOTES

Tips & Tricks for Your Brown Bag Presentation

NOTES

Positioning based on your firm's marketing plan
The most important discussion and training you can have with your technical staff is educating them on the target markets/clients outlined in your firm's marketing plan. Take the time to make sure that all of their efforts are focused in the direction approved by upper management. Spend a lunch-hour review your firm's marketing plan as a group.

How To Develop Hot Leads - The Five Best Lead Sources

1. Past and Present Clients - Implement a direct client contact program.

2. Published Resources - Review and clip articles everyday. Look for any kind of change in industry, company, or geographic area.

3. Market Research - Contact a market research department of large real estate companies and financial institutions. Request any information on identifying growing areas and expanding markets.

4. Networking - Make a prioritized list of everyone you know. Professional, social and personal contacts. Integrate these contacts into your direct contact program. Start a lead exchange group.

5. Participation in client organizations - Target selected client-oriented groups or associations for public speaking opportunities, sponsoring of special events or general participation.

Lead Identification
What is a lead?

A lead is not just a request for proposal announcement in the newspaper or a letter from a client requesting a proposal. It's identifying some kind of change.

Tips & Tricks for Your Brown Bag Presentation

NOTES

What is Rainmaking?

- Bringing in business
- Generating leads
- Developing relationships that turn into projects/profits

Who is responsible for rainmaking?

- Everyone at the firm
- There is no one right way to market
- Sales/rainmaking is your key to success

Balancing Client Relations and New Business Development Efforts

- General rule of thumb for 1-7 years – 2/3 Client Relations and 1/3 New Business Development
- This allows PMs/Principals to market and be billable

Rules of Rainmaking

- Sales means survival
- Manage billable and non-billable time wisely…use them both to your advantage
- Must take responsibility for your own client development actions
- Everyone is a marketer
- Remember marketing is persistence
- Market ALWAYS!!!!
- Face-to-face time with a prospective client is crucial
- Now is the time to start

Common misperceptions that hinder Business Development efforts

- I can't market because I must be billable
- Non-billable time is wasted time
- Clients don't respect "sales" people
- I only have to market to existing clients
- If I don't produce results in marketing, I have failed

Knowing Your Client Beyond the Project

NOTES

2 Key Areas of Client Relations:

- Client Feedback
- Marketing While Being Billable

Involvement Activities

- Client scenario worksheet
- Clients vs. customers worksheet
- Brainstorm 20 ideas of how to interact with a client that's not work-related
- Create a client contact plan
- Create a cross-selling plan
- 66 questions
- Brainstorm client survey questions
- Role play a project satisfaction interview
- Create a plan of action for follow-up

Tips & Tricks for Creating Your Brown Bag Presentation

- Client feedback
- Relative ease of getting work
- Creating surveys
- How to market and be billable at the same time
- Client care manager
- 15 reasons why a client might not hire you again
- Add-on services

Involvement Activity - Client Scenarios

NOTES

Handout the following questions to groups of staff members. Have each group discuss how they would handle the scenario and then discuss as a group.

Application

1. "Your Project Manager is out of the office. A distraught client calls and the phone call is forwarded to you. How do you handle the situation?"

2. "You are at a meeting with a client. You are given an opportunity to open the conversation to a more personal level. What are some of the questions that you could ask the client to learn more about him/her?"

3. ""You are working on a tight deadline for a project. Due to unforeseen circumstances, you are sure the project is not going to make a particular deadline that is 5 days away. How should you handle the change in schedule?"

4. "You have been asked to participate in a project kick-off meeting. This meeting will be held with individuals from your office as well as two individuals from the client's office. What are a few questions you could ask the client during this meeting that would help you to establish some client relations tasks to be carried out throughout the project?"

5. "Three weeks ago you called a former client to touch base. He mentioned that there were a few other projects pending in another department within his agency. How could you most appropriately proceed with following up on these leads?"

Involvement Activity - Clients vs. Customers

NOTES

Clients vs. Customers - Use the following sheet to help your staff turn customers into clients.

Do You Have Clients or Customers?

- Customer = buys a service once
- Client = long-term relationship

How to Make Someone a Client

- The marriage analogy – what are the elements of a great marriage?
- Become a resource
- Go above and beyond in your work
- Develop a relationship

In-House Exercise — Clients Vs. Customers

What does your firm pursue — clients or customers? As an essential step in your firm's client relations program, hold a brainstorming session with any staff that directly interacts with owners on a regular basis.

- Ask them if they would classify the owners your firm works with as clients or customers.
- Brainstorm with them to identify tactics to turn customers into clients.
- Issue a list of the tactics, composed by the group, to all staff members.
- Then once a quarter, hold a noon-time session to evaluate how many of those tactics staff have implemented, how successful the tactic was, etc.

Strive to turn all customers into clients within one year.

TURNING CUSTOMERS INTO CLIENTS

Client Name	Tactic to Change	Who is Responsible?	When Due?

Involvement Activity - 20 Non-Work Activities

NOTES

Brainstorm 20 ideas of how to interact with a client that is not work related. Ideas include:

Client Recognition (Thanking)
- submitting award jointly with client
- awards for best client and why
- gifts
- feature client in newsletter
- congratulatory notes (promotion)
- reception to honor clients
- thank you dinners
- round tables

Entertainment (Social Interaction)
- Inviting someone to a luncheon with a speaker that is talking about something of interest to client
- theater
- tickets to a game – make a list ahead of time
- golf tournament

Return-On-Investment (What Is It That You Could Give Back To Your Client That Is "Equivalent" To The Fees They Paid You For Your Last Job)
- donate services to a local charity in the name of the client
- saved client more money than they paid for your fee
- one year check up - walk through of project one year after operation
- Important thing is that you have to point these out to the client.

Other Involvement Activities

NOTES

Client Contact Plan
Use the following sheet to manage contact with existing clients. Have each staff member create for 1-2 clients and brainstorm ideas as a group.

Cross-Selling Services
Another way to reach out to clients is to remember that they probably don't know the full breadth of services your entire office provides. Brainstorm as a group all the services you provide and which clients may need more education. Use the attached sheet to help with organizing all this information and making a plan of action.

66 Questions
Review the attached sheet titled "66 Questions". Discuss the questions listed and develop your firm's own list of similar questions that you would find appropriate to tracking your knowledge of each key client.

Brainstorm Client Survey Questions
Using the guidelines on the following "Tips and Tricks" pages, conduct a brainstorming session to help formulate a project satisfaction survey. Discuss the types of questions you want to ask, the intervals in which you want to contact clients, assign a person to make the contacts and create a plan for what to do with the feedback.

Role Play a Project Satisfaction Interview
Once your questions are finalized, use a brown bag seminar to practice making the calls, fielding questions and knowing how and when to "dig a little deeper" to get the most helpful information.

Create a Plan of Action for Follow-Up
The purpose for these calls is to gather feedback to help your firm improve in the eyes of your clients. Many times the information gathered does not get the appropriate attention in order to "fix" any problems. Brainstorm as a group ideas of how you can make sure your clients know you are listening to their valuable feedback and taking action to improve.

EXISTING CLIENT CONTACT ASSIGNMENT SHEET

Project Name ____

Client Organization ____

Address ____

City ______________________________ State __________ Zip __________

Phone ______________________________ Fax ______________________________

Activity	Contact/Recipient Name	Firm Contact	Due Date

CROSS-SELL YOUR FIRM'S SERVICES

Market Sector: ______________________________

Client Name	Services Provided	Client Needs/Projects	Additional Services?

66-QUESTION CUSTOMER PROFILE
Harvey MacKay's "Swim With the Sharks Without Being Eaten Alive"

Date: ____________________
Last Updated: ____________
By: ______________________

Customer

1. Name / Nickname:
   Title:
2. Company Name and Address:
3. Home Address:
4. Telephone: Business / Home:
5. Birth date and place:
   Hometown:
6. Height / Weight:
   Outstanding physical characteristics (examples: balding, great condition, arthritis, back problems, etc)

Education

7. High School and year:
   College:
   Graduated when / degrees
8. College Honors:
   Advanced degree:
9. College Fraternity or sorority:
   Sports:
10. Extracurricular college activities:
11. If customer didn't attend college, is he/she sensitive about it?
    What did they do instead?
12. Military service:
    Discharge rank:
    Attitude toward being in the service:

Family

13. Marital status:
    Spouse's name:
14. Spouse's education:
15. Spouse's interests / activities / affiliations:
16. Wedding anniversary:
17. Children, if any, names and ages:
    Does client have custody?
18. Children's education
19. Children's interests: (hobbies, problems, etc)

Business Background

20. Previous employment: (most recent first)
    Company:
    Location
    Dates/Title:
    Company:
    Location:
    Dates/Title:
21. Previous position at present company:
    Dates / Title:
22. Any "status" symbols in office?
23. Professional or trade associations?
    Office or honors in them?
24. Any mentors?

25. What business relationship does he/she have with others in our company?

26. Is it a good relationship? Why?

27. What other people in our company know the customer?

28. Type of connection / nature of relationship?

29. What is client's attitude toward his/her company?

30. What is his/her long-range business objective?

31. What is his/her immediate business objective?

32. What is of greatest concern to customer at this time: welfare of the company or his/her own personal welfare?

33. Does customer think of the present or the future? Why?

Special Interests

34. Clubs or service clubs (Masons, Kiwanis, etc)

35. Politically active? Party?
    Importance to customer:

36. Active in community? How?

37. Religion:
    Active?

38. Highly confidential items: (Not to be discussed with customer – for example, divorce, member of AA, etc)

39. On what subjects outside of business does customer have strong feelings?

Lifestyle

40. Medical history (current condition of health):

41. Does customer drink? If yes, what and how much?

42. If no, offended by others drinking?

43. Does customer smoke? If no, object to others?

44. Favorite places for lunch / dinner:

45. Favorite menu items:

46. Does customer object ot having anyone buy his/her meal?

47. Hobbies and recreational interests:
    What does customer like to read:

48. Vacation habits:

49. Spectator-sports interest: -sport and team:

50. Kind of car(s):

51. Conversational interests:

52. Whom does customer seem anxious to impress?

53. How does he/she want to be seen by those people?

54. What adjectives would you use to describe customer?

55. What is he/she most proud of having achieved?

56. What do you feel is customer’s long-range personal objective?

57. What do you feel is customer’s immediate personal goal?

The Customer and You

58. What moral or ethical considerations are involved when you work with customer?

59. Does customer feel any obligations to you, your company, or your competition? If so, what?

60. Does the proposal you plan to make to him/her require customer to change a habit or take an action that is contrary to custom?

61. Is he/she primarily concerned about this opinion of others?

62. Or very self-centered? Highly ethical?

63. What are the key problems as customer sees them?

64. What are the priorities of the customer’s management?
    Any conflicts between customer and management?

65. Can you help with these problems? How?

66. Does your competitor have better answers to the above questions than you have?

Tips & Tricks for Your Brown Bag Presentation

NOTES

"Leadership....People who show who they are, by what they do with what they have."

- Nolte

Why is Client Feedback Important?

- 14% of the time clients change consultants because of dis-satisfaction with the product.
- 68% of the time clients change consultants due to poor ser-vice or ill treatment.
- It costs a firm 6-8 times more to obtain a new client than to keep a current one.
- It's the easiest way to get work.

The Relative Ease of Getting Work (easiest to most difficult . . .)

1. Add-on services to existing clients
2. Existing services to existing or past clients
3. Existing services in existing market to referred client
4. Existing services in existing markets to new client
5. New services to existing clients
6. New services to past client
7. New services in existing market to referred client
8. New services in existing market to new client
9. Existing services in new market to new client
10. New services in new market to new client

Why is it Important to Assess your Clients' Satisfaction?

- The easiest way to get work is with existing clients, do you know if they will hire you again?
- How can you be most effective in obtaining new business (from new or existing clients) if you don't understand what clients understand about your organization

NOTES

"Satisfaction Is Worthless, Customer Loyalty Is Priceless"
- Jeffrey Gitomer

Client Satisfaction Increases Profits

- An increase in the client-retention rate of 2% has the same effect on profits as cutting costs by 10%. Therefore, tactics through which clients can be retained and repeat business can be assured should be the highest priority in today's market.

- The average firm never hears from 96% of its unhappy clients. But 90% or more will not contract with them again.

- For every complaint, the average firm has 26 clients with problems. Of clients who register a complaint, 70% will do business with you again if you resolve the complaint.

- That figure jumps to 95% if the client feels the problem was resolved quickly.

- The average upset client tells nine people about his/her experience. One in five will tell more than 20.

- Better service performers charge, on average, about 9% more for their services.

- Firms with excellent client service grew twice as fast and picked up market share at least 6% per year, while those with poor client service lost 2% per year.
- Service stars earn a 12% return on sales, vs. an insignificant 1% for the rest.

Tips & Tricks for Your Brown Bag Presentation

NOTES

"Anyone who doesn't get along with people doesn't belong in this business, because that's all we've got around here."
- Lee Lacocca

Creating Surveys

In order to most effectively take advantage of your client service review program, the proper questions must be developed. Brainstorm as a group to create 10 hard-hitting questions to pose to clients about your service.

Conducting the Survey

Brainstorm as group/discuss pros and cons of each

- Mail
- E-mail
- In person
- Telephone

Surveying Intervals

There are a variety of times you can survey clients:

- Project schedule; i.e., schematic completion, design development completion, etc.
- Calendar schedule; i.e., monthly, quarterly, semi-annually, etc.
- PM request; i.e., at strategic times assigned by the Project Manager

Distributing the Information

- Close the loop – develop solutions to problems, get back to client, have PM acknowledge feedback
- cc: all management of everyone's surveys
- Hold monthly/quarterly client relations in-house focus meetings – brown bag – report on what we have learned (CPS, report card, etc.)
- Put on agenda of regular company all-staff meeting to review comments - promote good to employees and changes being made to improve service

Manage the Program

- Use excel spreadsheet

Using As A Competitive Advantage

- Use in interviews, client quotes, etc.

NOTES

Types of Questions

- Open ended questions
  What does success mean to you on a project?
  What does your company/organization feel are
  The most important issues on this project?
  What about you personally?
  What do you think of the quality of our work?

- Close ended questions
  Would you hire our firm again?
  Would you be willing to serve as a reference?
  Have we met your expectations thus far?
  Have we responded to change orders, rfis and rfcs in a prompt manner?

- Rating/ranking
  How would you rate our project manager's responsiveness?
  How satisfied are you with the service we've been providing you on this project?
  How would you rate the quality and usefulness of our field reports?

Topics to Consider

- Communication
- Leadership
- Expectations
- Responsiveness

Tips & Tricks for Your Brown Bag Presentation

What Clients Actually Say

DO	DON'T
Meet deadlines	Get offended or defensive if your design is questioned - usually there's a good reason to ask
Respond to problems, RFI's, change orders in the field **immediately**	Be stubborn or show disrespect - remember your client is just as knowledgeable as you are
State what the amount of a change order is so the client knows immediately how it impacts the budget	Be slow to respond or ignore project issues altogether - even if you can't do anything about a problem, at least call and discuss it
Have the principal stay involved in the project after they've made the sale	Have principals forget that they're still "workers"
Provide project follow-up - be willing to go to the site to address a project problem even if the project's been closed out for years	Have drawings go out w/o a principal reviewing them
Always debrief after you win or lose a job - the firms that ask humbly what to do better the next time are in a better position for more work	Tell the client that a construction problem isn't yours just because you weren't retained to provide CA services - it doesn't help the client solve their problem
Debrief during a project - principals need to know if it's working out with their project manager or if they think the PM needs help	Say you can meet the schedule or budget when you know you can't - be upfront about what's realistic
List exclusions in the scope of work; clients want to know what is <u>not</u> included	Claim projects you never worked on - say which portion of the project you did work on
Remember who's paying the bill - keep your ego in check	Bill at the principal rate when you're doing project manager work
When the client calls, say: "Mr. Smith, how can I help you?"	Itemize reimbursables if you don't have to - incorporate them into your fee as a percentage of your rates
Back up what you promised in the interview	Ever say "we just did what you (the client) wanted us to do" - clients expect you to be the expert and advise them of their options, how that impacts budget, etc. not use them as a cop-out
Be willing to go the extra mile without consideration of fee	Let your client have to be the "squeaky wheel" to hear from you
Invoice consistently	
Take a client to lunch occasionally and if it's not allowed, at least offer (and don't bill them for it)	
Practice <u>project</u> presentations before meeting with the client - come off as one polished group	
Offer to compensate if something goes awry	
Maintain a client-focus instead of a money-focus	
Offer to bring in lunch if scheduling a noon working meeting	
Hang in there w/ the client when the project gets tough - everybody makes mistakes, it's the firms that acknowledge them and step up to the plate to fix them that set themselves apart	
Communicate technical issues in non-technical ways (for users especially)	
Be a problem-solver - find solutions	
Be proactive: stay ahead of the client, call them before they call you	

Tips & Tricks for Your Brown Bag Presentation

NOTES

"When you know your customers, some of their special interests or characteristics, you always have a reason to contact them."

-Harvey Mackay, "How To Swim With The Sharks Without Being Eaten Alive"

How to Market and be Billable at the Same Time

- General rule of thumb – 2/3 Client Relations and 1/3 New Business Development
- This allows PMs/Principals to market and be billable

Who is Your "Client Care Manager"?

- Select a technical person – may want one for each division (maybe another division to teach how to cross-sell services
- Should be a rotating position???? – quarterly (get everyone experience, PICK NOW!
- Potential work from same client
- Referral from same client

Responsibilities of client care manager (needs to be another person that is not involved day to day)

- This person's job is to oversee what's happening with clients and create a program for review.
- Ask, "What is it that we are doing to further enhance our relationship with this client on this job and get another project from them?"
- Help brainstorm, bring ideas to the forefront.
- Good opportunity for more junior staff members to participate in marketing efforts. They are less busy. Good training and mentoring program.
- Participate in project's kick-off meeting and plan activities for entire project.

NOTES

15 Reasons Why Your Clients Might Not Hire You Again:
by Jeffrey Gitomer

1. Show no genuine or personal interest
2. Poor response
3. Unavailability of people
4. Difficult to do business
5. Unfriendly people on the front line
6. Poor or rude collection practices
7. Over-promising
8. Too eager to do more business
9. Inadequate capability to handle the customer's problem
10. Poor professional image
11. Dumb excuses about why you "can't"
12. Nickel-and-diming
13. Poor product quality
14. Poor service delivery
15. Poor training

NOTES

Eight Opportunities To Get Add-On Work From Your Clients
If your project team is failing to regularly seek add-on contract opportunities, you could be short-circuiting your level of success. The development of new projects from your existing workload should be a foundation of your firm's marketing program.
You'll discover these opportunities as your team learns about the client's goals during the course of a current project. Try these eight steps to make this discovery process a routine - not random - act:

1. Set aside time for a client's needs assessment to examine what's new, changing, or troublesome in the client's current operations. Conduct this assessment at quarterly points during the project's duration, or add it as an agenda item during weekly internal project team updates.
2. Track the nature and frequency of issues that crop up over the course of the project. Is a trend surfacing? Is one area of the client's operations in greater need of proactive help?
3. Compare needs that are surfacing in each of the firm's projects. Look for similarities, differences, trends.
4. Brainstorm with the project team, and across project teams, to identify strategies for working with recurring issues or ideas. Consider how to educate both project team members and the client concerning the issue or idea.
5. Compare ideas and strategies across project teams. Determine any general movement in client services on which you should act. Think about assembling a special technical team to work on the emerging issue.
6. Set the best ideas in motion. Fully include your client in developing the ideas and action plans.
7. Compare results across project teams. Determine which strategies appealed to clients and what rollout plan worked best. Integrate the ideas into your service and product lines.
8. Continue the needs assessment process cycle.

Remember: From a marketing standpoint, your current clients are your best clients.

Establish Yourself As Your Client's Partner

NOTES

Why is client-oriented association involvement important?

Involvement Activities

- Which association should I choose?
- Brainstorm "draw" ideas
- Develop and practice your elevator speech
- Create list of 5 information gathering questions
- Develop a process for tracking leads that come from the booth
- How to work a room (See Networking Tips & Tricks)
- Industry analysis worksheet (See Networking Tips & Tricks)

Tips & Tricks for Creating Your Brown Bag Presentation

- Association involvement benefits
- Tradeshow/Exhibiting techniques
- Gather list of attendees
- Use "free time" wisely

Involvement Activities

NOTES

Which association should I belong too?
As a group, brainstorm all the types of clients your firm could/would/should target. Divide up the client types and research what associations represent each client type. Make a list of local, regional and national associations. Create a sheet that includes their meeting schedule, dues/fees, conferences and sponsorship opportunities. Have each technical staff member pick one association he/she may be interested in becoming involved with and make a plan for how to get more involved.

Brainstorm "draw" ideas
Tradeshow exhibiting is all about getting people into your booth. There are many creative ways to accomplishing this and usually exhibitors are allowed a lot of latitude when it comes to developing ideas for doing just that . This can be anything from as simple as displaying equipment or tools used by your company to drawing for a prize to having a game that involves passers-by such as cards, golf or paddle ball. Holding contests can also be a fun way to get people to stay at your booth. Whatever you decide - do something fun that your staff will enjoy. The more they enjoy it, the more people will want to join in the fun and learn what you do.

Develop and practice your elevator speech
see #1 Public Speaking

Create list of 5 information gathering questions
Brainstorm as a group a list of possible questions that can be asked to those stopping by your booth to engage the attendees in conversation. This should be done by client group to reflect the different tradeshows. These questions should then be kept with the firm's tradeshow information so it can be reviewed with those working the exhibit prior to the next show.

Involvement Activities

NOTES

Develop a process for tracking leads that come from the booth

Discuss the importance of tracking potential leads that come from working a tradeshow booth. For example, after business cards are exchanged with a prospect, the staff member should note down on the back of the card the general idea of the conversation, needed follow-up and by who. These cards should then be given to the Marketing Department following the show to be entered into a spreadsheet of possible leads or new client relationships. Marketing should monitor the follow-up activities to make sure the assigned person is conducting the required follow-up and then added to prospect or lead tracking as appropriate. This is also a good protocol to follow to show your firm management what potential work came from exhibiting from the tradeshow. Often we spend thousands of dollars exhibiting and unless the results are tracked, it can be hard to assess the return on investment for being there. Logging this information and tallying results is a good way to show that return in order to get approval to exhibit again.

Tips & Tricks for Your Brown Bag Presentation

NOTES

Making the most of association Involvement

- Meet a large number of people in one place
- Able to have common interest depending on the association's goals
- Give opportunity for other vendor interaction to broader your contacts
- Become "active"

1. Don't worry about selling…work on introductions

- Introduce yourself
- Exchange business cards
- Talking about a subject other than work
- Ask for information about a company
- Ask if you can follow-up

2. Meet as many people as you can

- Share cabs
- Elevators
- Buffet lines
- Hotel registration and meeting check-in
- Tours, exhibit halls
- Attending a session
- Arrive early and stay late

3. Keep track of whom you meet

- Make notes as soon as you can
- Get list of registrants
- Review prior and after
- Name tags – peruse early

4. Make it easy for people to know you

- Wear your name tag on the right
- Speak slowly
- Assess if you know someone in common
- Strong eye contact

5. Follow-up after the meeting

- Timely (one week after)
- Prioritize your list of contacts
- Letter – state something unique you talked about…not boilerplate (see example)

Tips & Tricks for Your Brown Bag Presentation

NOTES

There are two ways in which you could make a sale with the help of a tradeshow.

Gather substantial leads.

- Raffle with business cards or entry forms
- Get list of attendees ahead of time and choose who you want to target
- Have a hospitality suite with something unique provided (Coke vs. Pepsi, breakfast not available at another time, desserts, etc.)

"Pre-sell" your attendance at the tradeshow.

- Schedule a meal with your clients/potential clients ahead of time
- Mail out a coupon/invitation to come to the booth for some kind of special give-a-way.
- Advertise ahead of time something special given away or available at your booth

Trade shows can be an incredibly effective promotion and sales tool for small businesses. But they can also be a complete waste of time and money. Here's how to get the best return on investment from any trade show in which you may choose to exhibit.

Set clear goals for your trade show participation.

What do you want to get out of it? Is your purpose to see existing clients? Or find new leads? Are you looking for a particular person? Is your goal to have your booth educate your clients about services you offer?

You can have more than one goal, of course, but the point is that you need to be clear about what your participation in trade shows is going to achieve.

Research trade shows.

You need to choose the trade shows that will give your firm the best return on investment in terms of your goals. The conference needs to be client-oriented if your goal is to meet new clients or existing clients.

You want to choose trade shows that best target the audience that you want to reach, and best suit your participation goals. Find out what the particular trade show's objectives are, and investigate and evaluate the trade show's audience.

Tips & Tricks for Your Brown Bag Presentation

NOTES

Once you've chosen particular trade shows, plan your budget and book your space.
Find out everything you can about your space, including where it is on the floor, what kind of other trade show displays will be around it, whether it's a high traffic or low traffic area, and the physical conditions of your trade show display space, such as lighting.

Plan your trade show displays in terms of your audience.
Who is it that you're targeting with your trade show displays? Different audiences "shop" trade shows differently, and have different needs. Try to use your booth as an educational tool that will draw people to want to talk with you.

Advertise in advance.
Put the word out that you're participating in a particular trade show by inviting your clients, consultants, suppliers, and other contacts to attend the show. (Be sure you give them all the details, such as your booth number.) Advertise your coming trade show attendance on your website as well.

Be an attendee-not an exhibitor. If the budget is tight this year, don't spend on trade show exhibits. Capitalize on the trade show by being a speaker or a panel expert. This will add credibility to your business and attract potential leads.

Train your trade show team. Trade shows are unlike other sales environments. Limited time and attention of attendees requires quick qualifying, and lead generating tactics. Make sure your staff is prepared and has a clear goal for each day.

Practice greetings and body language. Attendees are looking to the exhibit staff for a reason to spend time at that booth. The following body language will help convey a professional and approachable demeanor:

- *Stand up and greet attendees – in front of the booth.*
- *If seats are needed, use tall stools that create contact at standing eye level.*
- *Smile and make eye contact with attendees from all directions.*
- *Speak with trade show attendees, not colleagues.*
- *Sit down only if you are with a client who also wants to sit.*
- *Do not cross arms or legs.*
- *Be mindful of other people in the booth and near your space.*
- *Do not enter the space of another exhibitor.*
- *Thank attendees for spending time at your booth when they arrive and leave.*

Tips & Tricks for Your Brown Bag Presentation

NOTES

Call them while they're hot.
Staff frequently make the mistake of contacting trade show leads, months after the show. Make sure your employees have extra time and incentive to follow-up with all leads within weeks of your trade show exhibit.

Gather list of attendees ahead of time.
Request a list of the attendees early if possible. This gives you an opportunity to send out mailers announcing your booth number, prioritize which attendees will be at the top of your target list, schedule appointments for face-to-face time, etc.

Use "free time" wisely.
Use the conference's "free time" to your advantage. Arrange lunches and breakfast meetings with potential/existing clients.

The Key to Early Lead Generation

NOTES

What is Networking?

Involvement Activities

- List ideas for reasons to contact
- Brainstorm network creation worksheet
- Take business etiquette quiz
- Develop a follow-up plan

Tips & Tricks for Creating a Brown Bag Presentation

- Networking a room with style and grace
- Rules of networking

Involvement Activities

NOTES

List ideas for reasons to contact (brainstorm as a group first and then list additional from the list below). As you develop your network you may need ideas for reasons to touch base with your contacts.

- Request advice on book content
- Congratulate on a personal/life event
- Thank you for a referral
- Inquire about an association in which client is a member
- Congratulate on a promotion
- Request name of a vendor
- Ask to attend a meeting together
- Refer possible job candidate
- Thank you for check
- Congratulate on ground-breaking or project milestone
- Offer free consultation
- Provide help on professional association project
- Follow-up at 6 month and 1-year interval of project completion
- Provide information on potential customer
- Request coaching on prospect
- Provide information for use in speech
- Provide article clipped from paper
- Offer lead on job search

Brainstorm "Network Creation Worksheet"
Everyone working in your firm - both technical and non-technical - can network to gather information that may lead to future work. To help everyone stay organized, brainstorm as a group the contents for a Network Worksheet. Information to consider including: Contact Name, Company, Phone, Email, Reason for Contact, Notes, Follow-up Action, etc. Discuss as a group why certain people not in our industry are worthwhile to network with.

Take business etiquette quiz

Develop a follow-up plan
Have each of your technical staff bring their "rolodex" - whether electronic or hard copy - to this meeting and give them 10 minutes to complete the worksheet. Discuss as a group reasons they would want to contact people they know both inside and outside the industry. For example, one of them might have a neighbor who works in finance. He may want to go to lunch with him to discuss the current borrowing and lending climate, what his friend sees happening with loans and interest rates, etc. When the lists are complete, have each person share the top four contacts they're going to make in the next month (one/week). Marketing can then follow-up one-on-one with each staff person.

Involvement Activity - Business Etiquette Test

NOTES

Business Etiquette
Its more than just eating with the right fork. Customize the following questions and give to your staff. Answers are in red.

Question: 1) You, an engineering consultant, are walking along with your client, the City Engineer for the City of St. George, and two of his employees, when you meet a business acquaintance of yours. Obviously it falls to you to introduce the four of them to each other. Whose name should you say first?

a. The person standing on your right
b. The person you've known the longest
c. The President of Acme
d. Your business acquaintance

C. All you need to remember is that business introductions are determined by precedence. So in this case, you would say, "(City Engineer), I would like to introduce (your business acquaintance)," as the client is the most important person in this group. Always say the name of the most important person first and you can't go wrong.

Question: 2) I have become a client of yours and we have a meeting scheduled so you can show me what your company can do for me. When you're speaking to me, you should refer to me as:

a. Ms. Hammond
b. Keri Hammond
c. Mrs. Hammond
d. Keri baby

A. Good business manners dictate that you maintain a certain level of formality. Clients should always be addressed by their honorific or title followed by their last name - until and unless the client asks
you to do otherwise. And in business, all women are called "Ms.", regardless of their marital status.

Involvement Activity - Business Etiquette Test

NOTES

Question: 3) You have invited a client to a business lunch and upon arrival, a maitre d' is waiting to escort you to your table. You should:

a. Let your guest follow behind the maitre d' first
b. Walk ahead of your guest behind the maitre d'
c. Ask your guest if he or she would like to go first
d. Forge ahead yourself and lead the entire group

A. Let your guest follow behind the maitre d' first" is the right answer. Once you know the rule, this is an easy business dining rule to remember. If there's an escort, you bring up the rear (no matter how many guests there are). If there's no escort and you're expected to seat yourself, you should take the lead.

Question: 4) You're having a meal with a client in a restaurant. The waiter places a basket of bread on the table. You should:

a. Take a piece of bread and then offer the basket to the client
b. Take a piece of bread and place it on the client's plate
c. Pass the basket of bread to the client first
d. Ignore the basket; eating bread before the meal arrives is bad manners.

C. Pass the basket of bread to the client first" is the right answer. You should always whatever meal accompaniments or condiments that are meant to be shared to guests first before helping yourself. Salsa, salad dressing, pickles - whatever it is, pass it to your guests first. Eating bread before a meal is fine - as long as you share it in the right fashion.

Involvement Activity - Business Etiquette Test

NOTES

Question: 5) You have a meeting with a client but are expecting a call. You should:

a. Make sure your cell phone is charged up and turned on.
b. Set your cell phone ring volume to high to ensure you hear any calls.
c. Turn your cell phone off.
d. Tell your client you're expecting a call.

C. Turn your cell phone off" is what you should do. Having your cell phone ring during a meeting is just plain rude. It sends a message to the other attendees that they're unimportant and that you are certainly not bothering to give whatever is going on your full attention. So turn it off. Setting your cell phone to vibrate isn't a good option because answering a call when you're meeting with others is rude, too. The same rule applies to all other public events. Your cell phone should be turned off.

Question: 6) When you receive someone else's business card you should:

a. Immediately stuff it into your pocket.
b. Immediately pass them your business card.
c. Look at the card but say nothing about it.
d. Look at the card and acknowledge it.

D. Look at the card and acknowledge it" is the right answer. Business cards should always be received (and given) with respect. So when someone gives you a business card, you should look at the card and acknowledge it. Then place the card in your card case. (Stuffing the card into a pocket is a no-no.) If you're caught without your card case, keep the other person's business card in your hand while you converse. Exchanging business cards is certainly acceptable (and usually expected) but you would not do it "immediately". You don't want to give them your card until the ritual of receiving their card is complete.

Involvement Activity - Business Etiquette Test

NOTES

Question: 7) When you are conversing with someone, you should stand:

a. Ten feet away from them.
b. Six feet away from them.
c. Three feet away from them.
d. One and a half feet away from them.

C. Three feet away from them" is the right answer. This is the standard North American comfort zone for communication. If you are standing closer to the person than three feet, you will be invading his or her personal space. If you stand further away from him or her than this, you will be perceived as standoffish or end up yelling at the person you want to converse with. Remember that the communication comfort zone differs in different cultures. Before trying to do business in a different country, you should find out what the communication comfort zone is there - and whatever other customs there are that could affect doing business

NOTES

Networking Working A Room With Style And Grace

Expectations – What is the Desired Outcome?

- *Relationships*
- *Leads/Strategic Partnerships*
- *Visibility; for you or your firm*
- *Lasting Impression; will you be memorable? Be yourself.*

Mental Strategies:

- *Don't listen to the internal conversations – don't fear rejection or think you'll look stupid – find the right frame of mind.*
- *Always remember, people are more concerned about themselves than they are about you; they're just as uncomfortable as you are.*
- *Be real.*
- *Be ready to listen.*

Physical Strategies:

- *Arrive early; stand at an entrance*
- *Look for people not already engaged in conversation*
- *Move around the room*
- *Engage at a personal level first*
- *Avoid Traps*
    - *The table trap*
    - *The new "best friend"*
    - *The cold shoulder*
- *Dress for success*
- *Bring the right tools*
    - *Business Cards*
    - *Note Cards*
- *Work the buddy system*
- *Look at, not past*

NOTES

Networking Working A Room With Style And Grace Continued...

Rooms

Registration Lines
- *Introduce yourself to those around you; make the first move*

Keynotes & Workshops
- *Sit down next to someone who's alone*
- *Look for other first timers*
- *Bring along those you know*

Meal Functions
- *Introduce yourself to the entire table when first seated*
- *Introduce yourself to others as they join the table*
- *Move to another table between courses (main course/dessert)*

Receptions
- *The juggling act; a good way to join a table*
- *Pace yourself, drink lightly*

Trade Show Floor
- *Join others at demos/exhibits*
- *Connect with a common interest*
- *Identify a reason to follow up*

Parties
- *Pace yourself; how do want to be remembered?*

NOTES

Networking Working A Room With Style And Grace Continued...

Techniques Applied

Not Remembering a Name (thank goodness for name tags)
- *Always wear your name tag*

If you can't remember a name
- *Listen for clues*
- *Have a friend help out*
- *Give your name*
- *Apologize*

Starting a Conversation
- *Make the first move*
- *Introduce yourself and use the other person's name*
- *Look for clues of common interests – type of company, hobbies, jewelry, etc.*
- *Ask open-ended questions, but don't rapid fire questions like an FBI agent*

Entering a Conversation
- *This can be awkward; if it appears you might be interrupting, move on*
- *Ease in, don't barge in*

Ending a Conversation
- *Always show appreciation; "I enjoyed talking with you."*
- *"I don't want to take all of your time."*
- *"I want to get around to say hello to a couple of first timers."*
- *"I'd like you to meet Charles, I'll let the two of you talk, it was great to meet you."*

Listening
- *Nothing's harder, yet nothing is more important*

NOTES

The Basics - Rules of Networking
Paula Gamonal

It's About People
Talk and visit with people. Don't differentiate by position or standing within the company. Secretaries and janitorial staff actually have tremendous power to help or hinder your project work. Next time you need a document prepared or a conference room arranged for a presentation, watch how many people are involved with that process (you'll probably be surprised!) and make it a point to meet them and show your appreciation.

Make it a point to arrive ten or fifteen minutes early and visit with people that work near you. When you're visiting another site, linger over a cup of coffee and introduce yourself to people nearby. If you arrive early for a meeting, introduce yourself to the other participants. Talk a little about yourself- your hobbies, kids, or pets; just enough to get people to open up about theirs and get to know you as a person.

Keep notes on people. It's a good idea to remember what you can about people; and to be thoughtful. Send cards or letters for birthdays or congratulations of promotions or other events. People will remember your kindness, probably much longer than you will!

Peers and Subordinates: Impressing the boss isn't enough.
A 1997 study by Manchester Partners International, says even in this tight job market, 40% of new management hires fail in their first jobs. The key reason for their failure is their inability to build good relationships with peers and subordinates.   If you show respect and courtesy to everyone, regardless of position or company, you avoid discomfort or damaging your chances in any unexpected turn of events.

NOTES

Superiors
The only thing you owe your boss above and beyond what you owe peers and subordinates is more information. Unobtrusively be sure he or she knows what you're doing, is alerted as early as possible to issues that may arise, and is aware of outcomes and milestones. Never surprise your boss.

Meetings
If a subject is important enough to call a meeting, be considerate of the participants' time and ensure that it is well prepared.

THANK meeting members for their time and participation, and demonstrate (in the minutes or written record, at least) how their contributions helped meet the objective of the meeting. Participants are frequently left wondering if they've been heard or if their attendance and contributions were noticed. Distribute minutes or some written record (no matter how simple the meeting) to all attendees and absentees, with concise but complete descriptions of decisions made and including action items.

The Phone
Always return calls. Even if you don't yet have an answer to the caller's question, call and explain what you're doing to get the requested information, or direct them to the appropriate place to get it.

If you're going to be out, have someone pick up your calls or at a minimum, have your answering system tell the caller when you'll be back in the office and when they can expect a call back.

When you initiate a call and get a receptionist or secretary, identify yourself and tell them the basic nature of your call. That way, you'll be sure you're getting the right person or department and the person you're trying to reach will be able to pull up the appropriate information and help you more efficiently.
When you're on the receiving end of a phone call, identify yourself and your department. Answer the phone with some enthusiasm or at least warmth, even if you ARE being interrupted, the person on the other end doesn't know that!

Tips & Tricks for Your Brown Bag Presentation

NOTES

Make sure your voice mail system is working properly and doesn't tell the caller that the mailbox is full, transfer them to nowhere, or ring indefinitely. Address technical and system problems- a rude machine or system is as unacceptable as a rude person.

Personalize the conversation. Many people act in electronic media (including phone, phone mail, and e-mail) the way they act in their cars. They feel since they're not face-to-face with a person, it is perfectly acceptable to be abrupt, crass, or rude. We need to ensure that we make best use of the advantages of these media without falling headfirst into the disadvantages.

E-mail
Make the subject line specific.

Don't forward messages with three pages of mail-to information before they get to the content. In the message you forward, delete the extraneous information such as all the "Memo to," subject, addresses, and date lines.

When replying to a question, copy only the question into your e-mail, then provide your response. You needn't hit reply automatically, but don't send a bare message that only reads, "Yes." It's too blunt and confuses the reader.

Address and sign your e-mails. Although this is included in the To and From sections, remember that you're communicating with a person, not a computer.

DON'T TYPE IN ALL CAPS. IT'S TOO INTENSE, and you appear too lazy to type properly.

NOTES

Interruptions

Avoid interruptions (of singular or group work sessions, meetings, phone calls, or even discussions) if at all possible. Most management folks feel free to interrupt informal working sessions of subordinates, but need to realize that they may be interrupting a brainstorming session that will produce the company's next big success.

Always apologize if you must interrupt a conversation, meeting, or someone's concentration on a task. Quickly state the nature of what you need, and show consideration for the fact that you are interrupting valuable work or progress.

Appreciation/Credit

Always pass along credit and compliments to EVERYONE who made a contribution to the effort. Speak well of your coworkers and always point out their accomplishments to any interested party.

Dress/Appearance

It can be insulting to your coworkers or clients to show a lack of concern about your appearance.

Being wrinkled, unshaven, smelly or unkempt communicates (intentionally or not) that you don't care enough about the situation, the people or the company to present yourself respectably.

If in doubt, always err on the side of conservative. If you think jeans may be OK for a social event but aren't sure, show up in ironed khakis and a nice golf shirt. If you think a situation may call for dress slacks, wear a dress shirt and tie. If you have any inkling that a suit may be called for, dress to the nines.

Women's clothing is a bit more complicated, but again, err on the side of conservative and dressy.

Always practice impeccable grooming (even in a jeans environment!)

NOTES

Before an event, use your address book or your "people database" to refresh your memory about the people you are likely to meet.

If you forget someone's name, you can sometimes "cover" by introducing a person you do know first. "Do you know my Joe Smith, one of our account reps?" which will usually get the unknown person to introduce him or herself.

If this doesn't work, an admission that you've had a mental block is preferable to obvious flailing around.

This is a lot to consider, and there's a lot more out there. Volumes of information have been written on what is right and correct in business etiquette. It's enough to make veterans and newcomers too insecure to deal with people.

The important thing to remember is that if you strive to make the people around you feel comfortable and valued, you have succeeded whether you're perfectly in compliance with these or any rules you've read.

Writing is Easy. Editing is Hard.

NOTES

What are the elements of a winning proposal?

Involvement Activities

- Review past proposals
- Re-write project information sheets
- Review or establish a go/no-go policy

Tips & Tricks for Creating Your Brown Bag Presentation

- Why do proposals fail?
- Positioning before the RFP
- Developing your strategy
- Proposal process

Involvement Activities

NOTES

Review past proposals - consider features vs. benefits, incorporating comments from debriefings, proposal close-out process.
Pull out key proposals that have been submitted over the past year. Divide up the proposals and hand out 1-2 to each group. Have the group go through the proposal and give constructive feedback on areas of improvement and areas of strength. Take the perspective of a client reviewing the proposal. If you conducted a debriefing for this project, use the comments from your notes to discuss how you could have improved the content/approach.

Rewrite project information sheets using the attached features vs. benefits sheet. Have every member re-write the project description using this technique. Review and brainstorm as an entire group.

Create a "go/no go" sheet.
Create a "go/no go" decision matrix utilizing information from a group discussion.

Involvement Activity - Client Benefit Exercise

NOTES

Identify the advantages that your firm provides a client. List a past project your firm has completed. Answer the following three questions:

- What was the situation?
- What was your solution?
- What benefit did the solution provide the client?

Example Situation: Sequoia Hospital Acute Care Rehabilitation Unit

Sequoia Hospital saw an increasing demand for a rehab program. They had a licensed program, but no beds. The rooms were very small and didn't meet code. There were also structural problems with the building. Mechanical, electrical and fire systems all required upgrades as well.

Solution:

DES rehabilitated an under used facility. We created new space taking advantage of an existing courtyard and offered creative solutions to the structural approach. OSHPD allowed us to do our own plan checking due to our reputation in this area.

Benefit:

DES saved the client $500,000 and accelerated state review in OSHPD by two months. The hospital gained a state-of-the-art, model facility that other hospitals now want to emulate.

Involvement Activity - Go/No Go Policy

Go / No Go Decision Matrix

Proposal Factors		Decision Criteria			Estimated Rating		
		Negative (1, 2)	Neutral (3, 4)	Positive (5, 6)	Our Firm	Competitor A	Competitor B
1	Client Contact and Rapport	Unknown or virtually unknown to client	Known to client, but not well known	Well-developed relationship with client			
2	Marketing Intelligence	Did not expect RFP; project info limited to solicitation	Anticipated RFP, have collected adequate info	Distinct insights into client needs and expectations			
3	Competitive Advantage	Competitor is strongly favored	Open competition with no apparent favorite	Our firm in favored position for contract award			
4	Qualifications and Experience	Marginally qualified, limited or no relevant experience	Adequately qualified but no real edge over competitors	Technically superior to most competitors			
5	Project Team Availability	Needed team members are too busy or in distant offices	Needed team members have adequate availability	Very strong proposed team with good availability			
6	Profit Potential	Unlikely to make targeted profit on this project	Can meet profit goals if well managed	High likelihood to meet or exceed targeted profit			
7	Pricing Sensitivity	Selection primarily driven by price; commodity purchase	Client to balance price and qualifications in selection	Will select most qualified, then negotiate price			
8	Cost to Respond	High proposal costs relative to odds of winning	Proposal costs appropriate relative to odds	Excellent ROI; cost very appropriate for the odds			
9	Consistency with Marketing Plan	Opportunity not consistent with stated marketing goals	Opportunity fits within our stated marketing goals	Opportunity can't be passed up relative to our goals			
10	Odds of Winning	0-30% chance of winning	30-60% chance of winning	60-90% chance of winning			
Total Score (sum of 10 proposal factor ratings)							
Overall Rating (total score divided by 10)							
COMMENTS:					**DECISION:** ☐ GO ☐ NO GO		

INSTRUCTIONS:
1. The matrix should typically be filled out by at least three people who are familiar with the proposal opportunity.
2. For each proposal factor, record an estimated rating from 1 to 6 based on the decision criteria provided. You may choose to do the same for a prominent competitor or two.
3. The "Overall Rating" should be at least 4 before deciding to submit a proposal.
4. If the overall rating is less than 4, appropriate management approval should be obtained before proceeding with the proposal.

Tips & Tricks for Your Brown Bag Presentation

NOTES

"Keep in mind that client reviewers are typically looking for reasons to eliminate you from competition. You must minimize their opportunities."

-Mel Lester

Why Proposals Fail

No Positioning Before RFP Hits

- Have to do upfront positioning & selling – can't be over-emphasized
- If there's no positioning done before the RFP hits, then all you know about the project is what you read in the RFP. The client's critical issues will not be addressed in the project because it's in the upfront positioning that info is gathered.

No Insight Into Client's Real Issues

- It's how you address a client's issues that make or break your proposal being short-listed.

Proposals Lack Client Focus

- Have to be written from the client's perspective. The client has to feel that you have listened to them and reflected back to them that understanding in the form of possible solutions to their problems.
- Remember: it's all about the client, not us!

Weak Design/Content/Writing

- Not only poor writing but writing that isn't clear and concise. Proposal writing needs to communicate clearly and not be so technical and lay people don't understand the message.
- What needs to be clearly communicated: 1) an understanding of the project challenge and 2) a project approach that makes sense and is economical to meet that challenge.

NOTES

Why Proposals Fail Continued...

Lack Of Technical Leadership / Rely Too Much On Marketing Staff

- Producing winning proposals is culmination of a great marriage between marketing staff and technical staff. Neither can do it successfully without the other.

- Marketing staff's role: to develop the parts of the proposal that can be tailored to fit the project needs without a lot of technical input: cover letter, resumes, project experience, client quotes, references, etc. Edit for clarity and understanding, produce, deliver.

- Technical staff's role: to write the technical aspects of the proposal: executive summary, scope of work, project approach, etc.

Tips & Tricks for Your Brown Bag Presentation

NOTES

Positioning Before the RFP Hits

- Establish & Build The Client Relationship

- Identify Decision-Makers & Influencers

- Learn Selection Drivers
  - What's driving the selection for this project? (money, expertise, schedule, a person's career, etc.)
  - Are their factors that effect a person's job, a department's budget, etc.?

- Gather Project/Client Intelligence
  - What kind of project and client intelligence can you gather before the RFP comes out?

- Gather Political/Funding Intelligence
  - Why would you want to know about political or funding issues related to the project?

- Gather Competition Intelligence
  - Why is important to know if your competitors have done any preliminary work on this project OR helped write the RFP?
  - Find out what other CM's have already met with the client OR have an existing relationship with the client.
  - All of this is for the purpose of making an informed and strategic go/no-go decision.
  - Especially if you already know you'll be submitting, this up-front intelligence is critical to your proposal's success.

Tips & Tricks for Your Brown Bag Presentation

NOTES

When the RFP Hits

- Understanding The RFP
  - Have more than one person review the RFP
  - Some RFP's are well written, most are poorly written
  - Compare selection criteria against requested information
  - Does the RFP match the client/project research obtained?
  - What's missing?

- Making Your Go/No-Go - What are the benefits of using a go/no go process?
  - Holds people accountable
  - Creates consistency in making strategic decisions
  - Provides history for reviewing wins/losses and making strategic decisions
  - Determines champion necessary to be successful
  - Champion's commitment & responsibilities going forward

Tips & Tricks for Your Brown Bag Presentation

NOTES

Developing Your Strategy

- Holding Kick-Off Meeting:
  - How many have participated in a kick-off meeting?
  - How did you feel holding that impacted the success of the proposal?

- **Who** – key technical: pic, pm/champion, marketing/bd coord, etc.

- **What** – agenda topics (brainstorm as group)

- **Where** – conference room, table and door, no phones!

- **When** – how far before the due date? How long to allow for meeting?

- **Why** – what's the purpose of holding this meeting?
  - Ensures everyone is aligned w/ assignments and deadlines – gets everyone on the same page
  - Allows for sharing of intelligence gathered that will determine theme & content

NOTES

Proposal Production

Cover Letter
- Purpose of cover letter – it gets read
- Content: proposal summary/why hire us – revolve around proposal theme
- When to write (last vs. first?)
- Writing exercise/share content

Summary
- Content of summary: summarizes key points
- Keep concise and easy to read
- Incorporate theme graphics / language where possible
- Writing exercise/share content

Scope Of Work
- Content: use client's language
- Know audience – how technical?
- Note what you have responded to, added in or omitted from what's in RFP
- Incorporate theme graphics/language where possible
- Writing exercise/share content

Project Approach
- Technical person's responsibility - most of his/her time is spent here
- Base on pre-selling & RFP information / if don't have enough info, shouldn't be pursuing
- Here is where we differentiate ourselves
- Personality of client contact (staff person) should come through here
- Be graphic! Use charts, photos, past project examples & solutions
- Be specific about how you'll solve the client's problems
- Use past project examples to show how you approach and solve problems
- Incorporate theme graphics / language where possible
- Writing exercise / share content

NOTES

Proposal Production Continued...

Project Team

- Start w/ master resume – includes all project history (including from past employers)
- Interview staff person re: nuances of projects that could be closely related
- Tailor to fit individual project/client
- Make sure resume experience matches proposal experience
- Incorporate theme graphics/language where possible
- Writing exercise/share content

Project Experience

- Marketing pull initially and tailor - technical staff review
- Base on pre-selling information & RFP info
- If don't have enough info, shouldn't be pursuing
- Writing exercise/share content

Client References

- Always call before using, no matter how recent, it's a courtesy
- Calling also verifies their contact info is current and correct
- OK to use references who's left employer or project, use word "former"

NOTES

Proposal Production Continued...

Client Focused Writing

- The Process
  - Move up deadline
  - Know technical level of audience
  - Less is more
  - Be concise and clear
  - Stick to the subject
  - "So what?"

- Quality Control
  - Red team review
  - Edit / edit / edit / cut / cut / cut
  - Accuracy and proofing
  - Theme review
  - Consistency review

- Extra Touches
  - Client quotes/letters
  - Photos/graphics
  - RFP language
  - Owner language

Post Proposal Checklist

- Debrief Internally
- Replenish Marketing Materials
- Store "New" Info
- Debrief Client
- Interview Prep

NOTES

Be consistent in holding training sessions

Utilize junior level staff in preparing and conducting sessions

Break up training into a few sessions if you feel it's important

Use these sessions to "gather" information from the group (project page write-up, resume updates, competitor profiles, market research, business development/client relations plans, list of upcoming projects, etc.)

Have fun with it!