

Engage to Succeed!

By: Michael T. Buell, FSMPS
Client Development Director
International Speaker
Adjunct Professor

*Strategic Partnering +
Effective Communication =
Consistent Success!*

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Chapters

- Finding the Right Firm Culture
- The Life of Marketing and Business Development
- Strategic Plans that Matter
- The Impact of Networking
- What Needs to be Known Before an RFP
- Effective Proposal Process
- Presentations that Inspire
- Being the Leader You Need to Be

Building Strategic Partnerships

- The world and industry are getting smaller; we need partners more than ever
- Clients are interested in trust, services, and a true working relationship (not internal politics)
- With competition getting more fierce, we need strategic pursuits that broaden our interests
- Partnerships must be win/win for both firms

When is having a partner necessary?

- Seek a partnership when:
 - We truly understand our strengths and weaknesses in a geographic area or market segment
 - We don't have all the expertise or critical services necessary
 - Stretching into a new market, project type, or service
 - For construction firms, bonding capabilities come into play
 - We are unsure what the client thinks, feels, and needs

What should we look for in a partner?

- What are the characteristics of their leadership team?
 - Do they seem genuine...team-oriented?
 - What level of cooperation do they portray?
 - What will they do when things “go south”?
- Does their firm culture match with yours?
 - Are they client-focused?
 - Do they execute a genuine go/no go process?
 - Are they interested in long-term partnerships with clients?
- Are they contractually conducive?
 - What is their profit philosophy and can you both agree on it?
 - What is their willingness to compromise?

Can you develop a UVP for the partnership?

Keys to a win-win partnership

- Appreciate others' strengths, but stay confident in yours
 - Successful relevant projects
 - Relationship with the client
 - Location
 - Capacity
 - Presentation skills
 - Ability to create a winner!
- Agree who manages the client or project pursuit
- Have a written agreement in place

Tips for Primes Looking to Work with a Consultant

- Give them the respect they deserve
 - They are specialists
 - They likely have more insight in their profession than you do
 - If they are the right choice, they can help you win
- Confirm their relative experience
- Check references

Tips for Consultants Looking to Work with a Prime

- Try not to “hook up” with everybody
- Highlight your strengths early
 - Relationship with the client
 - Relevant portfolio
 - References
- Bring insight to the team’s message

IN SUMMARY

- ✓ Know when a “piece of the pie” is much better than none.
- ✓ Keep ego away from the focus on hand.
- ✓ Know what the client wants.
- ✓ Be flexible.
- ✓ Trust, but verify!

Finding the Right Firm Culture

- Do they believe trust and likeability inspire clients just as much as expertise?
- Do they involve people in the strategic planning process?
- Do they allow everyone a voice/chance to innovate?
- Do they recognize those who get things done?
- Do they support professional/leadership development?
- Do they know who pays everyone's salaries?

Your firm must be people-centric!

Strong managers...

- have trusted employees
- communicate
- share what needs to be done
- direct people
- want to see results
- plan and budget
- manage tasks
- administer
- eye the bottom line
- are good soldiers
- develop business relationships
- get things done

Managers..vs Leaders...

- have trusted employees
- communicate
- share what needs to be done
- direct people
- want to see results
- plan and budget
- manage tasks
- administer
- eye the bottom line
- are good soldiers
- develop business relationships
- get things done

**PEOPLE HAVE TO
WORK FOR MANAGERS**

- earn spirited disciples
- persuade
- share what can be done
- inspire people
- want to see achievement
- set a direction
- lead people
- innovate
- eye the horizon
- are their own person
- also develop personal relationships
- make things happen

**PEOPLE WANT TO
WORK WITH LEADERS**

The Life of Marketing and Bus Dev

- Marketing is all the talent and effort to create “all your stuff” in the process of creating your firm’s external and internal image
- Business development is all the talent and effort done face to face to impact position, hit rate and client loyalty
- Both roles are strategic in nature and must work well together
- Both should know what clients care about most and how to help technical staff share proper information effectively
- Both should know how to highlight both expertise and the specialness of their people, i.e., how to differentiate!

Listen & Apply!

The Life of BD and Technical Staff

- Respect their world and ego (to an extent)...
- Understand why they aren't focused on BD
- Don't try to turn them into what they are not
- Engage them about their work
- Use them as a resource about clients
- Utilize BD role as a relationship facilitator
- Give credit to them for their BD efforts/successes

Dimensions of Behavior

- Fill out profile questionnaire.
- Discuss how we do and how we should behave with colleagues, clients, peers, etc.

Dimensions of Behavior

- **Dominance**

- Motivated to solve problems and get immediate results.
- Tends to question the status quo.
- Prefers direct answers.
 - “I like being the/my own boss.”
 - “I know what I want and go after it.”
 - “I like to test myself with new challenges.”

- **Influence**

- Motivated to persuade and influence others.
- Tends to be open, verbalizing thoughts and feelings.
- Prefers working with a fun team rather than alone.
 - “I enjoy telling stories & entertaining people.”
 - “I get fired up about things.”
 - “I like freedom from control and details.”

Dimensions of Behavior

- **Steadiness**

- Motivated to create a stable, organized environment.
- Tends to be patient and a good listener.
- Prefers participation over directing; listening more than talking.
 - “I like working with people who get along.”
 - “I enjoy helping people.”
 - “I can be counted on.”

- **Conscientiousness**

- Motivated to achieve high personal standards.
- Tends to be diplomatic, carefully weighing pros/cons.
- Prefers environments with clearly defined expectations.
 - “I am good at analyzing things.”
 - I prefer facts to emotions.”
 - “I enjoy working with people who are organized and have high standards.”

Strategies for Success

- **Dominance**

- If you emphasize Dominance, be aware that others may prefer:

- to weigh pros and cons (C)
 - to receive an explanation for your decisions (C)
 - to socialize briefly before getting down to business (I)
 - to cautiously approach change (S)

- **Influence**

- If you emphasize Influence, be aware that other may prefer:

- to receive facts and short answers (D)
 - to use systematic and organized approaches (C)
 - to benefit from your personal follow-through (S)
 - to encounter a low-key, sincere approach (S)

Strategies for Success

- **Steadiness**

- If you emphasize Steadiness, be aware that others may prefer:

- to focus on the big picture and set priorities (D)
 - to make decisions quickly (D)
 - to know your needs and wants (I)
 - to challenge the way things are done (C)

- **Conscientiousness**

- If you emphasize Conscientiousness, be aware that others may prefer:

- To deal directly with conflict (D)
 - To use policies only as guidelines (I)
 - To openly communicate and negotiate with you (I)
 - To understand your rules and standards (S)

Compatibility/Effectiveness

	Excellent	Good	Fair	Poor
Relatability	Play/Work	Play/Work	Play/Work	Play/Work
D-D		P	W	
D-I		W	P	
D-S	W		P	
D-C		W		P
I-I	P	W		
I-S	W		P	
I-C			W	P
S-S	P	W		
S-C		W		P
C-C		W	P	

Identifying DISC Profiles

	D	I	S	C
Office	Trophies/BIG furniture	Group photos Piling system	Homey feel Plants	Organized Diplomas
What They Hear	Key points Bottom line	Fun stuff People events	Family Assurances	Consistency Facts/details
Salutation	"Mr./Mrs." (or none)	"What's up?" "Hey, buddy!"	"Hello First Name"	"Hello"
Chit Chat	No patience for rambling	Will let you ramble a minute or two	Will let you ramble to avoid conflict	Will let you ramble to process for evidence
Talking to Them	Rapid pace; little emotion	Rapid pace; friendly, fun	Slow pace; warm, caring	Moderate pace; formal

Create chemistry...

- Don't let your perspective or attitude get in the way of open communication or new ideas.
- Professionals can adapt their approach to almost any situation.
- If you can make your clients, colleagues or peers more comfortable, you win!

Strategic Plans that Matter

- Effort must be founded on honesty!
- Effort must involve strong cross-section of perspectives
- Effort must generate a common vision/list of goals
- Effort must include multiple elements
- Effort must produce accountability/identify champions
- Effort must set an “on the bus” or “off the bus” tone
- Monitor, measure, adapt, train...and recognize achievement!

It's a roadmap toward growth!

The Impact of Networking

- It's just talkin' to folks – you can network anywhere!
- Benefits are both professional and personal
- Working with gatekeepers
- Effective phone calls (cold calls vs leads vs referrals vs intros)
- Effective first client meetings
- Sharing knowledge along the way/Adjusting your approach
- Speaking + writing = reputation in the industry

Culmination of “art” and “science”

What Needs to be Known Before an RFP

- What drives the client's business?
- How would they define a perfect design/construction team?
- Why are they doing this project/What is its intended impact?
- How would they define complete success?
- Who will be involved in the decision/What are their hot buttons?
- What makes you an ideal candidate for the project?
 - Utilization of expertise/lessons learned/proven successes

Think past qualifications!

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- How would they define complete success?
- Who will be involved in the decision/What are their hot buttons?
- What impacts 'hit rate' the most?
- What makes your team or your firm unique?

Think past qualifications!

So Tell Me...

*How would you define
a strong client relationship?*

Fundamental Differentiators

- Though expected, these simple things can help you stand out:
 - Always being a professional
 - Returning your phone calls
 - Addressing issues in person/Following up consistently
 - Doing what you say you are going to do

Clients are experts at knowing if they feel valued.

Facts are Facts!

- Clients hire us because we:
 - Possess the appropriate expertise
 - Communicated a clear understanding of their needs
 - Gained a certain level of positive chemistry
- Clients continue to hire us because you:
 - Met or exceeded their needs
 - Understood, agreed on and managed expectations well
 - Earned their trust/Made them look good
 - Gained an open rapport

These are undisputable!

How Can You Succeed?

- Listen to your clients!
 - Know if their needs are being met...constantly...ART!
 - Share your knowledge along the way...SCIENCE!
 - Adjust your approach to their behavioral pattern.
 - Focus on helping...NOT selling!
 - After project completion, make sure it's performing.
 - Never stop sharing your unique value proposition.
 - Get to know them!!!

*Your relationship with your clients
has the most impact on future
projects and your career!*

Why Should You Get Engaged?

- The stronger client relationships you develop, the more valuable you are to the firm...period!
 - Job security
 - Better assignments
 - Promotion
 - Respect/Influence

*What should all of you
want to hear from clients?*

You Must Know How They Feel

- Client Feedback Surveys/Performance Reviews
 - Must be done in person
 - Must be done by someone not involved in the project
 - Client must be comfortable with the purpose and tone
 - Administrator must engage without preconceived ideas
 - Administrator must clarify sentiments and push for balance

*Get genuine thoughts and
act on them!*

After Any Project

- Identify the “client manager” to develop and prepare for future opportunities
 - Project Manager
 - Project Executive
 - Business Developer

It's gotta be somebody!!!

Relationships That Matter

- Always try to be an informer!
 - Share latest trends/technology advancements
 - Share lessons learned/on-going experiences
 - Share events/seminars/articles information
 - Introduce them to new hires
 - Ask them to engage in case study presentation/white paper
 - Ask them how they're doing/how you can help!

Be their trusted advisor!

Never Forget...

*Great ideas “presented well”
inspire people!*

Always understand your audience!

You don't need a title to be a leader!

Effective Proposal Process

- Kickoff meetings
 - Win/no win (if not already done)
 - Team makeup
 - Responsibilities
- Business development leads the messaging
- Marketing secures evaluation criteria
- Review process and accountability
- Cover letters that matter

Inspire them to want to see you!

Presentations that Inspire

- Already qualified, now time to connect!
- Focus your content toward your audience
- Rehearsals are to practice hand offs and flow, not content!
- Open with a BANG!
- Affirm project drivers/Introduce team with a purpose
- Invite engagement/create give & takes
- Address plan of action for each project driver
- What must resonate!

Deliberations You Want To Hear?

Being the Leader You Need To Be

- Always maintain your passion for success, your affinity for interpersonal communication and your commitment to helping others!
- Developing trust with clients, colleagues and peers
 - Clients – Enlighten, don't just entertain
 - Colleagues – Encourage by helping them connect with clients better
 - Peers – Engage those who are timid/new and connect others
- Three Drivers
 - Be RELEVANT.....CONSISTENT.....DISTINCTIVE, every day!
- Be at peace by living in the present – **make today matter!**

ENGAGE – INSPIRE – LEAD ON!

Questions?

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