

Engage to Succeed!

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Chapters

- Finding the Right Firm Culture
- Strategic Plans that Matter
- The Impact of Networking
- Differentiating Like You Mean It
- What Needs to be Known Before an RFP
- Effective Proposal Process
- Presentations that Inspire
- Creating Client Loyalty
- Being the Leader You Need to Be

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!

Strategic Plans that Matter

- Effort must be founded on honesty!
- Effort must involve strong cross-section of perspectives.
- Effort must generate a common vision/consensus.
- Effort must include goals, strategies and action plans.
- 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”

Differentiating Like You Mean It

- What is one of the toughest questions we get every day?
 - Why you? – What make your firm any different than all the others?
- How do most people answer that?
 - Features – the What!
- Where is the actual answer?
 - People and Culture – the How and Why!
- What is the other question they're actually asking too?
 - So What???

Are you really just another firm?

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 it's intended impact?
- 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!

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/Complete Inclusion
- Address plan of action for each project driver
- What must resonate!

Deliberations You Want To Hear?

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 the unique value of your people.
 - Get to know them!!!

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

You Must Know How They Feel

- Client Feedback Surveys/Performance Reviews
 - How are we listening, communicating, responding, leading?
 - Where would you rank our firm vs others?
 - How would you distinguish us vs others?
 - In what areas can we improve?
 - Would you like to comment on any individuals?
 - How do you prefer to be communicated with?

What could be more valuable information?

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!!!

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*
- Be at peace by living in the present – *make today matter!*

ENGAGE – INSPIRE – LEAD ON!

Final Thoughts

- **There will always be a place for creative people, personable people and strong leaders...especially for those who are all of the above!**
- **Ideas transform people...if you can share how they relate!**
- **You don't need a reason to call a client to offer support, insight or an invitation to anything!**
 - **You don't need a title to be a leader!**

Questions?

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